TradeTek

User’s Guide

Version 3.0

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Overview

TradeTek currently includes 64-bit Windows and 64-bit Mac versions that are designed to take advantage of the latest advances in technology. Utilizing multi-threading technology, this software's performance and processing speed increases with the use of faster, multi-core processors. While standard and HD displays are supported, the application is optimized for 4K, and Retina displays which help reduce eye fatigue when long days of estimating are required.

Developed from nearly 60 years of construction industry and software engineering experience combined, every detail has been carefully considered to ensure that the user experience is second to none. Designed to include all the robust features that today's construction professionals need in a takeoff and estimating software package while ensuring that 100% of the application is as easy to use as possible truly makes this a unique and cutting-edge solution.

Let's take a quick look at where things are located within the software (we'll get into more detail later). The following is a summary of the contents of each main tab in the application:

- **Home Tab**: The Home tab contains the **Job, Navigate, Dimension, Takeoff** and **Markup** button groups. The main page area in this tab is typically where most of your takeoff will be performed. There are 2 side panels in this tab to the left and right of the main page area.
- **Page Tab**: The **Page** tab contains the **Zoom/Pan, Rotate, Flip** and **Image Tool** button groups. This tab also contains the main page area and 2 side panels.
- **Tool Tab**: The **Tool** tab contains the **Takeoff Item** and **Calculation** button groups and contains the main page area and 2 side panels.
- **Estimating Tab**: The **Estimating** tab contains the **Estimate, Clipboard** and **Adjust** button groups. This tab also contains all takeoff items for the open job and displays the information with property columns that are determined by the selected estimating layout in the left side panel. The right side panel can display either **Pages, Estimating** or **Templates**.
- **List Tab**: The **List** tab contains the **List** and **Move/Update** button groups. All list files are displayed in the left side panel and the main area displays the selected list.
- **Template Tab**: The **Template** tab contains the **Template Tools, Clipboard, New Assembly** and **Adjust** button groups. The main are contains the **Set Default Properties** tab, **Sample Assemblies** tab and all other user added templates tabs. The right-side panel will display either **Pages, Estimating** or **Templates**.
- **Report Tab**: The **Report** tab contains the **Report Actions** button group. The main area displays either the **Preview** or **Build** tab of the selected report. The left side panel displays all sample and user added report files. The right-side panel contains all of the report tools used for building reports.
- **Help Tab**: The **Help** tab is where you can access the User's Guide, videos and report bugs or request new features.

License Management

To access the **License** dialog, click **File** at the top left corner of the window then click **About TradeTek**. Next, click the **License** button at the bottom left corner. To look up your activation serial number, click the **Lookup Serial Number** button then enter the email address associated with your account. To view your activation data or to release or restore a license, click the **License Options** button. To manage all of your TradeTek licenses, click the **License Management** button. In the top left corner of the **License Management** dialog, click on a license name to view all activity for the license in the area below. To add a new serial number to the **License Management** dialog, click the **Add** button and then enter the license name and serial number. To edit a licenses name or serial number, click on the license name to select it, then click the **Edit** button. To delete a license from the **License Management** dialog, click on the license name to select it, then click the **Delete** button. The total number of allowed activations for your account is displayed to the right of the **OK** button. Click the **Info For This Computer** button for information to help identify this computer from the activity list. Click the **Bundles This Computer** button to view all bundles that are licensed or available to this computer. To dismiss the dialog, click the **OK** button.

Preferences

To access the preferences dialog, click **File** at the top left corner of the window and click **Preference** from the drop-down menu. The **Preference** dialog allows you to set the following preferences that will be applied each time that you use the application:

- If the **Retain Window Size and Position on Open** checkbox is checked then the main application window size and position will be saved from the last time that you used the application and will be restored upon next launch. If not checked, the app window will open to maximized.
- Toggle the mouse wheel zooming capability on or off with the **Mouse Wheel Controls Zoom** checkbox.
- To set the application to auto save check the **Auto Save Changes** check box then choose the interval in minutes from the drop down menu. To manually save changes, Click **File** and then **Save** from the drop-down menu.
- To automatically save changes on close, check the **Save On Close Without Asking** checkbox. Otherwise, you will be asked each time you close the application if you want to save your changes or not.
- By default, the **Help** tab videos will play inside of the application. If you are using 4K monitors the videos and controls may appear smaller than normal. If this occurs, check the **Play Videos in Default Web Browser** check box to launch the **Help** videos into a separate web browser window. You may also want to launch videos into a browser window to be able to move them around.
- When the **Set Qty 0 For Off SubItems** check box is checked, all assembly sub-items that are turned off by checking the **Off** check box will have a quantity value of 0.
- When the **Wide Assembly Dialogs** checkbox is checked, all assembly dialogs will be wider making it easier to read item names with longer names.
- With some older computers, TradeTek page performance such as the cursor guidelines, page zooming and page panning may experience a lag. If this is the case, check the **Slow Graphics Compatible** check box which may help improve performance on older computers.
- The **Username** edit field by default contains the username that the application has obtained from your computer. You can change your username here in the **Preference** dialog. If multiple users have access to your job files, your username will be used to identify to them when you are actively working in the file.
- By default, TradeTek is in imperial measurement mode. To switch to metric mode, check the **Metric** check box. The settings and properties for the takeoff tools in the **Set Default Properties,** new assemblies that are created and added to assembly groups and new jobs that are created are all set based on the current measurement mode. When a job is opened, TradeTek automatically toggles the measurement mode to match the mode that the software was in when the job was created.
- If the **Cursor Gridline Color** check box is checked, a horizontal and vertical gridline will be visible extending from the page area cursor in the **Home** and **Page** tabs. To change the gridline color, click the color box and choose a new color.
- The **OK Cancel Button Order** radio buttons allow you to set the default order of these buttons in the dialogs to either the Windows standard or Mac standard order.
- Lists of items in multiple areas of TradeTek can optionally be alphabetized. Set the desired mode by selecting on of the **Alphabetic Sort Order** radio button options.
- By default, you will occasionally receive notifications from TradeTek Software on launch. To turn these notifications off, uncheck the **Notifications** check box. To view a list of recent notifications, click the **Show Notifications** button.
- To activate the **Developer** tab and developer help videos, check the **Developer** check box. The **Developer** tab gives you access to the API sandbox and allows you to create plugins.
- To turn the application desktop API on, check the **API** checkbox. Otherwise, the desktop API is not accessible.
- To turn the application cloud API on, check the **Cloud API** checkbox. Otherwise, the cloud API is not accessible.
- If your internet connection is slow, check the **Allow Slow Internet** checkbox. This will allow functions that require the internet to not time out as quickly.

- Check the Experimental AI check box to activate experimental AI features. When checked, a dialog is presented with more information including the features that are included in the current build.
- The **Separate CSV Columns** radio button selection determines the format of exported CSV report files. **Comma** is the most common format and is the default selection.
- The **Images in Excel Workbook** radio button selection determines if images that are included in exported excel reports are embedded in the excel file or are linked in the file to an image stored on your computer. The default selection is **Embedded**. In very large reports with multiple images, if performance is an issue, then select the **Links** option prior to exporting.
- In the **Report Resolution** drop-down menu, choose either **Good**, **Better**, or **Best** resolution. This will typically need to be determined based on the resolution of your monitor. For example, with standard resolution monitors if **Best** is selected, the report likely will not display properly. If you have a 4K resolution monitor, then **Best** will provide the best possible report resolution. You can customize the way the exported reports are named by typing in a name in the **Export Name** field, or setting the desired **Job, Report** or **Date** check boxes to construct a naming convention. To name the report differently each time it is exported, set the **Ask Me** check box.
- In the **Resolution** drop-down menu, choose either **Good**, **Better**, or **Best** resolution for screenshot images. Older computers may take longer to generate larger page size screenshots in certain file types. Downgrade the resolution to help screenshots process faster.
- Pattern images are used by markup tools to paint the surface of a shape or draw images on the page. Default images are included during installation. Click the **Default Patterns** button to restore the original images or to merge the default images to images that you have added.
- Click the **Keyboard Shortcuts** button to assign shortcuts to various functions within TradeTek.
- To manually set the name of the report file that gets exported from TradeTek, type the desired name in the **Export Name** edit field. Additionally, you can also construct the name of the exported report by setting the appropriate Job (name), Report (name) and Date checkboxes for the values that you want included in the report file name.
- If you have a large number of assemblies, there are several areas in the software that must scan through all of the assemblies to generate property lists which can take some time to process. To optimize this, set the **Cache Template Property Lists** checkbox. This will store a cache of all existing properties so that the software does not have to re-scan constantly. If you add new properties to assemblies, in order for them to become available in the calculation formula drop-down lists you will need to click the **Clear Cache** button then generate the new cache.
- Adjust the page legend transparency by selecting from the **Legend Dim Color** drop-down menu and adjust the background color by selecting from the drop-down menu.
- Adjust the page transparency by selecting from the **Page Dim Color** drop-down menu and adjust the page color by selecting from the drop-down menu.
- The **Export** button allows you to export all your preferences including all the settings in the **Preference** dialog, all custom estimating layouts from the **Estimating** tab, all lists that have been added in the **List** tab, all assembly groups that have been added in the **Template** tab and all reports that have been created in the **Report** tab. The exported file can then be imported by another computer. You can also export these individually from their perspective tabs.
- The **Import** button allows you to import a preference file that has been exported from another computer.
- The **Show** button opens to the folder location where the preference file is stored.
- The **Backup** button saves a copy of the current preferences on the local computer.
- The **Restore** button restores the preferences from the most recent backup.

- Click the **Admin Protection** button to set restrictions on what regular users can access in TradeTek. As an Admin user, enter a password. To turn protection on, click the **Protection ON** button (this must be done on all computers in the organization). To login as an Admin user, click the **Admin Login** button. To set the restrictions for regular users, click the **Restrictions** button and set the appropriate check boxes for areas to restrict. If you are creating a private or 3rd party bundle, click the **Register Bundle** button to register the bundle information with TradeTek Software so that a meaningful message can be displayed to the user when attempting to use an unlicensed bundle. Once protections have been setup on the **Admin** user's computer, those settings can be shared with regular users either by exporting the **Admin** user's preference file and then importing into the regular user computers or by creating a bundle (items that are added to bundles will retain all protection settings. User added properties in assemblies can be individually locked by clicking the lock icon in the **Edit Property** dialog. To lock or unlock all properties at once, hold down the **Shift** key while clicking the lock icon of one of the properties. This feature is only available when logged in as **Admin**.

Saving Changes

You can manually save changes at any point by clicking **File** at the top left corner of the application window and click **Save** from the drop-down menu. To set the application to automatically save changes every 5 minutes click **File**, click **Preference** from the drop-down menu and check the **Auto Save Changes Every 5 Minutes** checkbox. To set the application to save changes on close without asking, check the **Save On Close Without Asking** checkbox. Otherwise, you will be asked each time you close if you would like to save changes or not.

Properties

Takeoff tools, assemblies, assembly sub-items and **Estimating** tab folders can all include both default properties (non-user added) and user added properties. The 4 available property types are Text, Number, Color & Image. Text and Number properties include value formulas that allow you to reference other values of the same type from anywhere within its "family tree". A "family tree" includes any user added job properties along with an item and all its sub-items. For example, an assembly with multiple sub-items located within a folder in the **Estimating** tab would be an example of a "family tree". In this scenario, a user added text property in an assembly sub-item could reference other text properties located in other assembly sub-items, the assembly itself and the folder containing the assembly (same goes for number properties).

Dot notation is used to access properties contained within other items. To access properties in takeoff tools or assemblies use [Item Name.Property Name]. To access properties in assembly sub-items, use [Sub-Item Tab Name.Property Name]. Properties that have been added to **Estimating** tab folders can be accessed in nested folders up to 3 levels deep. To access a property in a folder 1 level up use [Folder.Property Name]. To access a property in a folder 2 levels up use [FolderUp1.Property Name] and to access a property in a folder 3 levels up use [FolderUp2.Property Name]. Properties can be added to **Estimating** tab folders in the **Template** tab -> **Set Default Property** tab and then referenced from assemblies in the **Assembly Group** tab. *Properties must be added to the folder in the **Set Default Property** tab before they become available in the drop-down lists in the formula editors.*

- **Text Properties**: With default text properties that already exist within the takeoff tools, assemblies, assembly sub-items and **Estimating** tab folders you will typically only be providing a value. For example, when you add a folder to the **Estimating** tab, you are prompted to provide a value for the **Name** property. When you add a custom text property to something you will input the name of the property and will construct the value in the **Text** field by either entering text, selecting the value of another existing text property or the combination of both. To select the value of another existing text property, choose that property from the **Select Property** drop down menu. To construct a value from a combination of an existing text property and text, simply select the desired existing property from the list and add the additional text before or after the existing property in the **Text** field. For example, if you wanted to add an existing property called “First Name” and then add the last name with text this is what it would look like in the ”Text” field: [First Name] Smith. If the property “First Name” had a value of “John” then the value of this property would be “John Smith”. Text properties can also be connected to a single column list created in the List tab that allows you to choose the value from that list.

- **Add a Text Property**: In the **Edit Text Property** dialog, type the name of the property in the **Name** input and type the property value or formula in the **Text** area. You can optionally connect the property result to a single column list in the List tab by clicking the **Connect To List** button at the bottom left corner of the **Edit Text Property** dialog and following the prompts. Click the **OK** button to add the text property. When the property is added, it will become visible in its parent dialog. To edit or delete the property, click the **…** button at the far-right side of the property.
- **Number Properties**: With number properties you will be providing the property name, quantity value or formula and the result format. The available result formats are 0, 0.0, 0.00, 0.000, 0.0000, 0.00000, 0.000000, Feet to Inches, Inches to Feet, Round Up, Round Down, Feet / Inches, Inches. The following is a description of how some of the non-obvious format’s work:
    - Feet to Inches: Converts the input value from feet to inches. For example, if the result value is 1 the converted value will be 12.
    - Inches to Feet: Converts the input value from inches to feet. For example, if the result value is 12 the converted value will be 1.
    - Round Up: Rounds up the value to the nearest whole number.
    - Round Down: Rounds down the value to the nearest whole number.
    - Feet / Inches: Displays the value in feet and inches format. For example, if the result value is 10.125 the converted value will be 10’ 1 ½”. This format is for display purposes only and cannot be used as an operand in a formula.
    - Inches: Displays the value in inches format. For example, if the result value is 10.125 the converted value will be 121 ½”. This format is for display purposes only and cannot be used as an operand in a formula.

  To edit the **Qty Formula** in the **Edit Number Property** dialog click the **…** button at the far right to launch the **Formula Editor** dialog. You will notice above the text area the available formula operator buttons. Clicking one of these buttons will insert the operator at the cursor location. To the right of the operator buttons is the operand drop down list with **Select Property** displayed that provides all the available number properties within the “family tree”. Clicking on one of these properties in the list will add it as an operand in the formula at the cursor location. You can create formulas that contain a combination of number properties, operators, and literal numbers (numbers that you type into the equation). Formulas will execute from left to right and anything inside of “()” operators will execute before continuing to the right. For example, let’s say that we have created a linear wall assembly called “Wall Assembly” and we have added a sub-item to the assembly and named the sub-item tab “Studs”. In the Studs sub-item, we have added a number property called “OC Spacing” with a value of “16” and a format of “Inches to Feet” and another number property called “Waste” with a value of “10” to represent 10% waste. In the “Quantity” property of the Studs sub-item we need to write a formula to calculate the number of studs needed in the wall based on the required stud on center spacing. To do this, we need to take the total linear feet of the takeoff measurement (we do this by grabbing the “Linear” property of the “Wall Assembly”), divide it by the stud on center spacing and then add a waste factor. Here’s an example of what the formula might look like in the **Formula Editor**:

[Wall Assembly.Linear] / [Studs.OC Spacing] * ([Studs.Waste] /100 + 1)
If the entered formula is working, the result shown in the bottom left corner of the **Formula Editor** dialog should be a valid number. If there is a problem with the formula, the result should display an error message.

- **Add a Number Property**: In the **Edit Number Property** dialog, type the name of the property in the **Name** input. In the **Qty Formula** input, you can either type in a number for the value or click the **…** at far-right to open the **Formula Editor** and add a calculation formula. In the **Format** drop down, choose the desired value format. Click the **OK** button to add the number property. When the property is added, it will become visible in its parent dialog. To edit or delete the property, click the **…** button at the far-right side of the property.
- **Add a Color property**: In the **Edit Color Property** dialog, type the name of the color property in the **Name** input. Click into the color box to display a color wheel and click into the color wheel to choose the color. Click **OK** to add the color property. When the property is added, it will become visible in the takeoff tool dialog. To edit or delete the property, click the **…** button at the far-right side of the property.
- **Add an Image property**: In the **Edit Image Property** dialog, type the name of the image property in the **Name** input. Click the **Select Image** button then navigate to and select the desired image. The image will be displayed in the display area. Click **OK** to add the image property. When the property is added, it will become visible in the takeoff tool dialog. To edit or delete the property, click the **…** button at the far-right side of the property.

Once multiple properties have been added, the order of the properties can be rearranged by clicking the **Property Order** button located in the **Takeoff** tab of the dialog.

Home Tab

Side Panels

From the drop-down list at the top of each side panel you can choose to display **Pages, Estimating** or **Template**s in either side. The width of side panels can be adjusted by hovering the mouse over the vertical bar that separates the page area from the side panel to make the move arrows visible, then dragging the side panel to the desired width. Side panels can also be hidden by clicking **<<** or **>>** at the top right and top left of the side panels. Side panels can also be undocked and moved around the screen or to another display by clicking the **Undock** buttons in the bottom right and left corners.

- **Pages**: The Pages side panel contains 6 page related buttons:
  - <u>Add Folder:</u> Add a folder to the **Pages** side panel area. Pages can then be placed inside of the folder for organizational purposes by dragging the page below the folder. To move the page back out of the folder, drag the page above the folder.
  - <u>Add Page:</u> Adds additional pages to the project.
  - <u>Duplicate Page:</u> Makes a copy of the currently selected page.
  - <u>Delete:</u> Deletes the selected takeoff, page or folder.
  - <u>Property:</u> Make changes to the selected takeoff, page or folder. For pages, batch rename and reposition pages using dialog buttons. Dim a page by choosing the Dim percentage from the Page Dim drop down menu at the top right of the Name Page dialog.
  - <u>Expand All:</u> Expands all pages showing all page sub-items.
  - <u>Collapse All:</u> Collapses all pages hiding all page sub-items.
  - <u>Organize:</u> If a folder has been added to the **Pages** side panel, click the **Organize** button to batch move pages in and out of folders.

- Page Text Color: Changes the text color of the active page in the **Pages** side panel.

The search field allows you to type characters that are compared against the page names narrowing the list of visible pages to help find pages faster. When a sub-item has been added to a page, the "+" and "-" buttons to the left of the page allow you to expand or collapse the page making the sub-items either visible or not visible. A page's name can be changed by either double-clicking on the page or by clicking the **Property** button above. The red and blue square button to the right of the page name will toggle the page back and forth between color and black & white. The light bulb button to the right of the color button will toggle all takeoff items on that page from visible to invisible. If the scale on a page has been set, the scale icon will appear to the right of the light bulb.

- **Estimating**: The **Estimating** side panel contains 5 related buttons:
  - Add Folder: Add a folder to the **Estimating** side panel area. Takeoff items can then be placed inside of the folder for organizational purposes by dragging the takeoff item below the folder. To remove the takeoff item from the folder, drag the item above the folder.
  - Duplicate: Click to create a duplicate of the selected takeoff item.
  - Delete: Deletes the selected takeoff item or folder and all of its contents.
  - Expand All: Expands all assemblies in the **Estimating** side panel making all assembly sub-items visible.
  - Collapse All: Collapses all assemblies in the **Estimating** side panel making all assembly sub-items invisible.

The search field allows you to type characters that are compared against the takeoff or assembly item names narrowing the list of visible takeoff items to help find items faster. The "+" and "-" buttons to the left of assemblies will expand or collapse the assembly which will make assembly sub-items either visible or invisible. To launch a takeoff tool or assembly dialog from the **Estimating** side panel double click on the item's icon to launch the dialog which will allow you to make changes prior to starting the takeoff. You can optionally hold down the **Shift** key while double-clicking to launch immediately into takeoff mode. Once the dialog is launched, you can continue doing additional takeoff with the item by clicking the **Continue Takeoff** button at the bottom of the dialog. The light bulb button toggles the visibility of the takeoff item on the page between visible and invisible. The color button displays the color of the takeoff item on the page. Click the color button to change the color of the takeoff item.

- **Templates**: The **Templates** side panel contains 2 related buttons:
  - Expand All: Expands all assemblies in the **Templates** side panel making all assembly sub-items visible.
  - Collapse All: Collapses all assemblies in the **Templates** side panel making all assembly sub-items invisible.

The assembly group drop down menu allows you to choose which assembly group to display in the side panel. The **+** and **-** buttons to the left of assemblies will expand or collapse the assembly which will make assembly sub-items either visible or invisible. To launch an assembly in either the **Home, Page** or **Tools** tab to perform a takeoff, click on the assembly to select it and then click the green button that appears to the left of the assembly's name to launch its dialog allowing you to make changes prior to starting the takeoff. Optionally hold down the **Shift** key while clicking the green button to launch directly into takeoff mode.

Page Area

Clicking on a page in the **Pages** side panel will display the page in the page area. You can add additional page display tabs by clicking the **Add a Page** tab above the page and selecting the desired additional page to be displayed in the **Pages** side panel. Clicking on a page tab to select it and then clicking it again will display buttons allowing you to undock or delete the page tab. Undocking a page will place it in a separate window that can be moved around the display or moved to another display. Only one page panel can be active at a time. Click into a page panel to make it the active panel. Closing the undocked window will redock the page tab. You can move the displayed page around in the page area by either sliding the vertical and horizontal scroll bars or by activating the pan tool by right click + hold and dragging the page around. You can zoom the page in or out by either using the mouse wheel or by using the zoom buttons in the **Zoom/Pan** button group located in the **Page** tab. If you wish to use the mouse wheel zooming functionality, be sure that the **Mouse Wheel Controls Zoom** check box is checked in the **Preference** dialog located in the **File** drop down menu. At the bottom left corner of the application window the page scale, page size and measurement type is displayed. At the bottom right corner of the application window are the following page related buttons:

- **Snap**: Click the **Snap** button and set the **Snap On** checkbox to turn the Snap feature on. The snap indicator circle color and size can optionally be changed at the top of the **Snap Options** dialog. Set the appropriate snap mode check boxes. It is best to select only the snap modes that you need for performance reasons. **Markup Grid** will snap to grid corners when a grid overlay has been added to a page. **Markup Points** will snap to markup points of markups that have been drawn on the page. **Takeoff Points** will snap to takeoff points of all takeoffs that have been added to a page. **Single Line Drawings** will snap to corners of thin, single line plan drawings (page content). This option will work well for uncluttered drawings such as roof plans or elevation plans without excess lines drawn. For more cluttered drawings, this option will not provide much value. Just be aware that this option works well in some cases and not in others, so it's up to the user to determine when it's appropriate to use. We recommend setting up a short cut key from the Preferences dialog (File -> Preference) to toggle **Snap** on and off. This makes it faster if you need to toggle it on and off while performing a takeoff.
- **Box**: Toggles the drawing mode for area, area cutout and linear takeoffs between standard and **Box** mode. To draw in **Box** mode, click the first point at the top corner of the box and drag the cursor away from the first point diagonally, then click the second point to complete the box takeoff. It is recommended that **Ortho** be toggled off when **Box** mode is active.
- **Ortho**: Toggles between freehand and ortho drawing mode. **Ortho** mode makes it easier to draw horizontal, vertical, and 45-degree lines.
- **Verify Points**: When **Verify Points** is toggled on, when each takeoff point is added, a dialog is presented allowing for the distance from the previous point to the current point to be verified and adjusted if needed.
- **Layers**: Up to 10 layers can be created to added takeoffs to. Click the **Layers** button to launch the **Takeoff Layers** dialog. Double click on a layer name to rename the layer. When a takeoff tool is launched, select the desired layer to apply it to from the **Layer** drop-down menu. Layers allow you to show, hide or lock all takeoff items in that layer at one time.

Job Button Group

The **Job** button group located at the top of the **Home** tab contains the following buttons related to job management:

- **New**: To create a new job click the **New** button to launch the **New Job** dialog. Enter a job name or quote number, an optional job description and optional job notes. Select the job's storage location and choose the measurement type. For metric jobs, choose the default measurement units from the drop-down list to the right of the measurement type selection. The default measurement units will automatically be set as default in the standard takeoff tools. Select the type of plan files to be imported. By default, TradeTek uses multi-core processing for bound pdf files. Some user accounts have restrictions that don't allow multi-core processing. If the bound pdf processing is not working, uncheck the **Multi-Core Bound PDF Processing** check box. In the **Page Images** area, choose to generate the page images in either **Color**, **Mono** or **Both**. Click the **Next** button to continue. Select the plan files to be imported. For multiple individual files, select or highlight all files to be imported and click **Ok** or **Open**. If you need to import multiple bound pdf files, choose one to import while creating the new job and then import the additional files by clicking the **Add Pages** button in the **Pages** side panel after the new job has been created.

- **Open**: To open an existing job click the **Open** button, select the job storage location, select the desired job and click the **Open** button.
- **Property**: To access the job properties of the open job, click the **Property** button. Here you can modify or add new job properties. You can modify or add default job properties from the main **Templates** tab -> **Set Default Properties** tab and double click on **Job Property**. Any changes that you make here will become the default settings for each newly created job moving forward. You can add multiple job note categories that can be individually displayed in reports. To add a new note category, click the **Add** button to the right of the **Note** drop-down menu, then add the notes in the **Note** field. Note categories can also be set up in **Set Default Properties**.
- **Manage**: To add job storage folders and move, copy to, clone, merge or delete jobs click the **Manage** button. Here you can add folders to organize your jobs in, move jobs between folders, move jobs or folders containing jobs from one storage location to another, copy an existing job from one location to another, clone a job in the same storage location or merge multiple jobs into one job.
- **Storage**: To create a new job storage location click the **Storage** button. Click the **New** button, name the new storage location and then navigate to a folder that will contain the new storage location. A job storage location can be added on your local computer, a network drive or in a cloud storage location. Other team members can access your job storage locations allowing them to access jobs that you have created if access is granted. Click the **Change Local Storage** button to change the default location where all jobs are processed and local jobs are stored.
- **Import**: To import a job file that has been exported from the app click the **Import** button, navigate to, and select the file to be imported. Double clicking on a job file will automatically import the job.
- **Export**: To export a job file click the **Export** button, optionally change the job file name, add an optional password, and click **Ok**. By default, the file will be saved to your desktop, click the **Change Location** button to change the location for the file to be saved to.

Navigate Button Group

The **Navigate** button group located at the top of the **Home** tab contains the following buttons related to page navigation:

- **Back**: Once you have navigated through some pages by clicking on them in the **Pages** side panel, you can go back 1 level at a time in the reverse order that you navigated by clicking the **Back** button.
- **Forward**: Once you have navigated backwards through your page selections, you can go forward one level at a time in the reverse order by clicking the **Forward** button.

Dimension Button Group

- **Scale**: To set the page scale click the **Scale** button located in the main **Home** tab in the **Dimension** button group. You can choose to either set the scale from the drop-down list or set a manual scale based on a known dimension on the plan page. To set the scale from the drop-down list simply choose the appropriate scale from the list in the **From List** tab of the dialog. To set a manual scale, click on the **Manual Scale** tab and follow the instructions in the dialog. Once the scale has been set, use the **Measure** tool to check against several dimensions on the plan page to ensure that they are matching up. **YOU ARE RESPONSIBLE FOR ENSURING THAT THE SCALE HAS BEEN ACCURATELY SET FOR THE PAGE(S). WE WILL NOT BE HELD RESPONSIBLE FOR ANY LOSS DUE TO INCORRECT CALIBRATION OF PAGES.**
- **Measure**: To measure a distance on a plan page, from the main **Home** tab in the **Dimension** button group, click on the **Measure** tool. Click on the starting point and then the ending point of the dimension and the measured dimension will be displayed in a message box.

Takeoff Button Group

The takeoff tools are located in the **Takeoff** button group in the **Home** tab. Default characteristics for each takeoff tool can be set in the **Templates** main tab in the **Set Default Properties** tab. From within the **Set Default Properties** tab, click on a takeoff tool to launch its dialog, make changes, or add properties and this will become the default configuration for that takeoff tool. You can add up to 10 custom properties in the **Info** tab and 10 custom properties in the **Takeoff** tab.

- **Area Takeoff Tool**: Once the active page has been scaled the area takeoff tool can be used to perform an area takeoff. From the **Home** tab, click the **Area** button in the **Takeoff** button group to launch the dialog.
  The following inputs are found under the **Info** tab:
    - <u>Name:</u> Type in the name of the area takeoff.
    - <u>Multiply:</u> The area measurement will be multiplied by the number in the **Multiply** input.
    - <u>Quantity:</u> The default value is [Area] which will result in the area square footage. Click the **…** button to the right of the **Quantity** input to add a custom calculation formula for the quantity value. The formula editor works the same as described above for **Add a Number property**.
    - <u>Units:</u> Change the quantity value units.
    - <u>Color:</u> This is the color of the takeoff item on the page. Colors are selected randomly by default but can be changed by the user here.
    - <u>Pitch (/12):</u> Add a pitch factor to the **Area** takeoff property value located in the **Takeoff** tab.
    - <u>Add Property:</u> Add up to 10 custom properties in the **Info** tab.
    - <u>Refresh:</u> The refresh button will refresh the values of all properties when changes have been made.
    - <u>Folder:</u> If a takeoff folder(s) has been added in the **Estimating** tab, a folder can be selected from the drop-down list for the takeoff item to be placed into. A takeoff folder can be pre-set in the tool by typing the name of a folder to the right of **Default Folder** in the dialog. If a folder by that name exists in the Estimating tab, the takeoff will be placed in that folder. If the folder does not exist, one will be created.

  The following inputs are found under the **Takeoff** tab:
    - <u>Area:</u> Displays the area takeoff measurement which can be adjusted by the **Multiply** and **Pitch** inputs in the **Info** tab.
    - <u>Segment Count:</u> Displays the number of perimeter line segments. A line segment is a portion of the perimeter line between 2 points.
    - <u>Point Count:</u> Displays the total number of takeoff points around the perimeter of the area.

- Perimeter Linear: Displays the total linear measurement around the perimeter of the area.
- Section Count: Displays the total number of takeoff sections that have been created. A takeoff section represents one instance of a takeoff. For example, if an **Area** takeoff tool is launched and 2 rectangular takeoffs are drawn on a page then 2 takeoff sections have been created.
- Add Property: Add up to 10 custom properties in the **Takeoff** tab.

Click the **OK** button at the bottom right corner of the **Area Takeoff** dialog to start the takeoff. Click the first point on the page to start the takeoff and then click all the required perimeter points to complete the takeoff. To end the takeoff, tap the **Esc** key. To end one takeoff section and start a new takeoff section either double click at the last point of the section or tap the **N** key. To undo the last takeoff point while the tool remains active, tap the **Shift** key. To draw an area curve, click the starting point of the curve then tap the **C** key to toggle the tool into curve mode, click the second point of the curve then move the cursor to shape the curve as needed then tap any arrow key to capture the curve (use the arrow keys to adjust the curve as needed). Tap the **C** key again to toggle the tool out of curve mode.

- **Area Cutout Tool**: To cut out an area within an existing area takeoff, launch the **Area Cutout** tool. Click the first point over the existing area to start the cutout and then click all the required perimeter points to complete the cutout. To end the cutout, tap the **Esc** key.
- **Linear Takeoff Tool**: Once the active page has been scaled the linear takeoff tool can be used to perform a linear takeoff. From the **Home** tab, click the **Linear** button in the **Takeoff** button group to launch the dialog.

  The following inputs are found under the **Info** tab:
  - Name: Type in the name of the linear takeoff.
  - Multiply: The linear measurement will be multiplied by the number in the **Multiply** input.
  - Quantity: The default value is [Linear] which will result in the takeoff linear footage. Click the **…** button to the right of the **Quantity** input to add a custom calculation formula for the quantity value. The formula editor works the same as described above for **Add a Number property**.
  - Units: Change the quantity value units.
  - Color: This is the color of the takeoff item on the page. Colors are selected randomly by default but can be changed by the user here.
  - Pitch (/12): Add a pitch factor to the **Linear** takeoff property value located in the **Takeoff** tab.
  - Add Property: Add up to 10 custom properties in the **Info** tab.
  - Refresh: The refresh button will refresh the values of all properties when changes have been made.
  - Line Width: Set the width of the line that is drawn on the page.
  - Line Width Units: Set the units of the line width that is drawn on the page.
  - Folder: If a takeoff folder(s) has been added in the **Estimating** tab, a folder can be selected from the drop-down list for the takeoff item to be placed into. A takeoff folder can be pre-set in the tool by typing the name of a folder to the right of **Default Folder** in the dialog. If a folder by that name exists in the Estimating tab, the takeoff will be placed in that folder. If the folder does not exist, one will be created.

  The following inputs are found under the **Takeoff** tab:
  - Linear: Displays the linear takeoff measurement which can be adjusted by the **Multiply** and **Pitch** inputs in the **Info** tab.
  - Segment Count: Displays the number of line segments. A line segment is a portion of the linear between 2 points.
  - Point Count: Displays the total number of takeoff points in the linear takeoff.

- Section Count: Displays the total number of takeoff sections that have been created. A takeoff section represents one instance of a takeoff. For example, if a Linear takeoff tool is launched and 2 separate lines are drawn on a page then 2 takeoff sections have been created.
- Add Property: Add up to 10 custom properties in the **Takeoff** tab.

Click the **OK** button at the bottom right corner of the **Linear Takeoff** dialog to start the takeoff. Click the first point on the page to start the takeoff and then click all the required linear points to complete the takeoff. To end the takeoff, tap the **Esc** key. To end one takeoff section and start a new takeoff section either double click at the last point of the section or tap the **N** key. To undo the last takeoff point while the tool remains active, tap the **Shift** key. To draw a linear curve, click the starting point of the curve then tap the **C** key to toggle the tool into curve mode, click the second point of the curve then move the cursor to shape the curve as needed then tap any arrow key to capture the curve (use the arrow keys to adjust the curve as needed). Tap the **C** key again to toggle the tool out of curve mode.

– **Segment Takeoff Tool**: Once the active page has been scaled the segment takeoff tool can be used to perform a segment takeoff. From the **Home** tab, click the **Segment** button in the **Takeoff** button group to launch the dialog.

The following inputs are found under the **Info** tab:

- Name: Type in the name of the segment takeoff.
- Multiply: The linear measurement will be multiplied by the number in the **Multiply** input.
- Quantity: The default value is [Linear] which will result in the takeoff linear footage. Click the **…** button to the right of the **Quantity** input to add a custom calculation formula for the quantity value. The formula editor works the same as described above for **Add a Number property**.
- Units: Change the quantity value units.
- Color: This is the color of the takeoff item on the page. Colors are selected randomly by default but can be changed by the user here.
- Pitch (/12): Add a pitch factor to the **Linear** takeoff property value located in the **Takeoff** tab.
- Add Property: Add up to 10 custom properties in the **Info** tab.
- Refresh: The refresh button will refresh the values of all properties when changes have been made.
- Line Width: Set the width of the line that is drawn on the page.
- Line Width Units: Allows the user to set the units of the line width that is drawn on the page.
- Folder: If a takeoff folder(s) has been added in the **Estimating** tab, a folder can be selected from the drop-down list for the takeoff item to be placed into. A takeoff folder can be pre-set in the tool by typing the name of a folder to the right of **Default Folder** in the dialog. If a folder by that name exists in the Estimating tab, the takeoff will be placed in that folder. If the folder does not exist, one will be created.

The following inputs are found under the **Takeoff** tab:

- Linear: Displays the linear takeoff measurement which can be adjusted by the **Multiply** and **Pitch** inputs in the **Info** tab.
- Segment Count: Displays the number of line segments. A line segment is a portion of the linear between 2 points.
- Point Count: Displays the total number of takeoff points in the segment takeoff.
- Section Count: Displays the total number of takeoff sections that have been created. A takeoff section represents one instance of a takeoff. For example, if a **Segment** takeoff tool is launched and 2 separate lines are drawn on a page then 2 takeoff sections have been created.
- Add Property: Add up to 10 custom properties in the **Takeoff** tab.

Click the **OK** button at the bottom right corner of the **Segment Takeoff** dialog to start the takeoff. Click the first point on the page to start the takeoff and then click the second point of the segment to end the current section. Click the next point to start the next new section. To end the takeoff, tap the **Esc** key.

- **Count Takeoff Tool**: Once the active page has been scaled the count takeoff tool can be used to perform a count takeoff. From the **Home** tab, click the **Count** button in the **Takeoff** button group to launch the dialog.
  The following inputs are found under the **Info** tab:
  - Name: Type in the name of the count takeoff.
  - Multiply: The count will be multiplied by the number in the **Multiply** input.
  - Quantity: The default value is [Count] which will result in the takeoff count. Click the **…** button to the right of the **Quantity** input to add a custom calculation formula for the quantity value. The formula editor works the same as described above for **Add a Number property**.
  - Units: Change the quantity value units.
  - Color: This is the color of the takeoff item on the page. Colors are selected randomly by default but can be changed by the user here.
  - Shape: Choose the shape of the takeoff item as seen on the page from a drop-down selection.
  - Add Property: Add up to 10 custom properties in the **Info** tab.
  - Refresh: The refresh button will refresh the values of all properties when changes have been made.
  - Folder: If a takeoff folder(s) has been added in the **Estimating** tab, a folder can be selected from the drop-down list for the takeoff item to be placed into. A takeoff folder can be pre-set in the tool by typing the name of a folder to the right of **Default Folder** in the dialog. If a folder by that name exists in the Estimating tab, the takeoff will be placed in that folder. If the folder does not exist, one will be created.

  The following inputs are found under the **Takeoff** tab:
  - Point Count: Displays the total number of takeoff points.
  - Shape Width (Units): Set the shape width and width units as seen on the page.
  - Shape Length (Units): Set the shape length and length units as seen on the page.
  - Add Property: Add up to 10 custom properties in the **Info** tab.
- **Copy & Paste Tools**: To copy an existing takeoff item, select the item on the page by clicking on it and then click the **Copy** button.

Adjust Takeoffs

- **Continue a Takeoff**: Once at least 1 takeoff section has been added, the takeoff item becomes visible beneath the active page in the **Pages** side panel. To re-launch the takeoff tool to add more takeoff sections, double click on the takeoff item to launch the dialog and click the **Continue Takeoff** button at the bottom of the dialog, or optionally hold down the **Shift** key while double clicking to launch immediately into takeoff mode.
- **Move a Takeoff Section**: To move a takeoff section on a page, left-click-hold, drag the section to the desired new location and release.
- **Add a Takeoff Point**: To insert a takeoff point into a linear or area perimeter linear line, place the cursor in the desired location of the new point and double click.
- **Delete a Takeoff Point**: To delete a takeoff point, select the takeoff section to make the points visible then double click on the point that you would like to delete.
- **Move a Takeoff Point**: To move a takeoff point on a page, left-click-hold, drag the point to the desired new location and release.

Page Tab

The side panels and main page area in the **Page** tab are the same as in the **Home** tab. For information regarding the side panels or main page area, refer to those sections under the **Home** Tab area of the user's guide.

Zoom/Pan Button Group

The **Zoom/Pan** button group located at the top of the **Page** tab contains the following buttons related to page navigation:

- **Fit Page**: Adjusts the selected page to the lowest zoom level, allowing the entire page to be visible in the page area.
- **Zoom In**: Adjusts the selected page's zoom level up 1 level.
- **Zoom Out**: Adjusts the selected page's zoom level down 1 level.
- **Pan**: Toggles the cursor to pan mode, allowing you to left click + hold and drag the page around. Click the Pan button again to toggle pan mode off.

Rotate Button Group

The **Rotate** button group located at the top of the **Page** tab contains the following buttons related to page adjustment:

- **Left**: Rotates the selected page 90 degrees to the left.
- **Right**: Rotates the selected page 90 degrees to the right.
- **180**: Rotates the selected page 180 degrees.
- **Level**: To horizontally level a page, click the **Level** button and follow the instructions in the dialog.
- **Batch**: To rotate more than one page at a time, click the **Batch** button and selected the desired pages a rotate function from the dialog.

Flip Button Group

The **Flip** button group located at the top of the **Page** tab contains the following buttons related to page adjustment:

- **Vertical**: Flips the selected page 180 degrees vertically.
- **Horizontal**: Flips the selected page 180 degrees horizontally.

Markup Button Group

The **Markup** button group located at the top of the **Page** tab contains the following buttons related to page markups:

- **Draw**: From the **Draw Markup** dialog, select an **Arrow**, **Box**, **Pen**, **Circle**, **Rnd Box**, or **Area** markup tool, set its properties. Draw markups can be applied in layers, select the appropriate layer for the **Layer** drop-down menu. Click the **OK** button to launch the tool. Pattern images can be added to area markups. To select a pattern image to apply to an area markup, click the **Pattern** button at the bottom right corner of the markup dialog for Area, choose the appropriate pattern and set its properties. To access the pattern library, from the **Template** tab, click the **Set Defualt Property** tab then click on **Pattern Images**. Select a markup tool section and delete it with the **Delete** key, move a markup section by click and dragging it to the new location. To add or remove a markup point, click on the markup to select it, then double click on an existing point to present the manage points dialog. To enter curve mode with a pen or area markup, press C. When you click the next point, you can change the curve between those points. Press C again to exit curve mode. To complete a markup, tap the **Esc** key, to end one markup section and start another, double-click or tap the **N** key. Default properties can be set for the draw tools in the **Set Default Properties** tab in the **Template** tab.

- **Highlight**: From the **Highlight Markup** dialog, select a **Box** or **Pen** highlighter tool, set its properties and click the **OK** button to launch the tool. Select a highlighter section and delete it with the **Delete** key, move a highlighter section by selecting it and tapping the arrow keys (hold down the **Shift** key to speed up), press the **Shift** key to undo the last point while the highlighter tool is active. To complete a highlighter markup, tap the **Esc** key, to end one highlighter section and start another, double-click or tap the **N** key. Default properties can be set for the highlighter tools in the **Set Default Properties** tab in the **Template** tab.
- **Note**: From the **Markup Note** dialog, type the note text in the text area. Set the font style, font size, text color, text alignment in note, note color and note transparency (these default settings can be changed in the **Set Default Property** tab located in the **Template** tab). Click the **Link** button to add a link to a file stored in the job (will be included in an exported job file), an external file or a URL. Click the **OK** button, click the first point at the top left corner of the desired note position then click the second point at the bottom right corner of the note. Click the green circle in the bottom left corner to display the linked item. Double click in the note area to re-launch the dialog to make adjustments to the note. Click in the note area to select it then tap the **Delete** key to delete the note.
- **Image**: From the **Markup Image** dialog, select either **Stored in Job** or **External File**. An image that is stored in the job will be included in an exported job file while an external file will only be available from your computer. Images can be assigned to different markup layers. Select the appropriate layer from the Layer drop-down menu. Click the **New** button to create a new image by utilizing the built-in image editor. To add an image that is saved to the clipboard, click the **Clipboard** button. To add an image from the Patterns library, click the **Patterns** button. To add an image that is saved to the local computer, click the **Disk** button. Click the first point at the top left corner of the desired image location then click the second point at the bottom right corner to add the image. Left-click-hold and drag to reposition the image. Click on the image to select it then tap the **Delete** key to delete the image.
- **Overlay**: From the **Markup Overlay** dialog, name the overlay, select the page to be overlayed onto the currently displayed page, adjust the overlay transparency and overlay color if needed. Click the **OK** button to add the page overlay.
- **Grid Layers**: Click the **Grid Layers** button to set up a page grid overlay and to define and modify markup layers. Set the appropriate radio button for no grid, visible grid or to adjust the grid. Select the desired grid line type from the drop-down menu. Select the grid line distance increments and desired dimness from the drop-down menus and choose the grid line color. To save a copy of the currently formatted grid to use on a different page, use the **Save** and **Load** buttons. To modify markup layers, click the **Layers** button. Double click on a layer name to modify the name. To hide or lock a layer, set the appropriate check boxes. To set a layer to the "plan" level so that all takeoffs and all other markup layers are placed on top of the layer, set the **Plan** checkbox.
- **Markup Tools**: To perform actions on the selected markup items, click the **Markup Tools** button. From the Markup Tools dialog you can copy and paste markup items, rotate left or right, flip vertical and horizontal, and bring to front or send to back. Click and drag markup points to move them, double click to add or delete markup points.

Tool Tab

The side panels and main page area in the **Page** tab are the same as in the **Home** tab. For information regarding the side panels or main page area, refer to those sections under the **Home** Tab area of the user's guide.

Takeoff Item Button Group

The **Takeoff Item** button group located at the top of the **Tool** tab contains the following buttons related to takeoff item adjustment:

- **Rotate Left**: Rotates the selected takeoff section on a page 90 degrees to the left.
- **Rotate Right**: Rotates the selected takeoff section on a page 90 degrees to the right.
- **Flip Horizontal**: Flips the selected takeoff section on a page 180 degrees horizontally.
- **Flip Vertical**: Flips the selected takeoff section on a page 180 degrees vertically.

Calculation Button Group

The **Calculation** button group located at the top of the **Tool** tab contains the following buttons related to determining pitch and angles on a page:

- **Pitch**: Click the anchor point on a page, then move the mouse away aligning the guideline with a line on the drawing to determine its pitch. Click the second point to terminate the tool.
- **Triangulate**: Click three points on the page to set the two legs of a triangle and the diagonal length, leg lengths and corner angles are provided. Click on one of the corner circles to select the triangle to delete it.

Image Tool Button Group

The **Image Tool** button group located at the top of the **Page** tab contains the following buttons related to page images:

- **Crop as New Page**: Click the **Crop as New Page** button to launch the tool. Click the first point at the top left corner of the desired crop area, then click the second point at the bottom right corner of the crop area (will be highlighted in blue). Name the new page then click **OK**. The new page will be added at the bottom of the page list in the **Pages** side panel.
- **Copy to Clipboard**: Click the **Copy to Clipboard** button to launch the tool. Click the first point at the top left corner of the desired area then click the second point at the bottom right corner of the area (will be highlighted in blue). The selected area is now placed in the clipboard and is available to paste.
- **Screenshot**: To capture the entire selected page with all takeoff and page items, click the **Screenshot** button. Name the screenshot file and choose the desired file type. The screenshot file will be saved to the desktop.
- **Batch Screenshot**: To generate screenshots of multiple pages at the same time, click the **Batch Screenshot** button. Name the folder that the screenshots will be placed in on the desktop, set the appropriate file type radio button and then set the check box next to each desired page then click the **OK** button to process the screenshots. To send the files to the printer or to a PDF printer, select either the **Print** or **Merged Print** radio button. Click the **Page Setup** button to adjust the appropriate page settings. You can optionally set one of the three location option check boxes if the screenshot size does not match exactly with the print page size.
- **Page Legend**: Click the **Page Legend** button to toggle the page legend on and off. Click the legend to select it and move the perimeter points to resize the legend. Select and drag the legend to reposition it on the page.
- **Fix PDF**: When PDF pages are created at a size other than what they were drawn at, this can cause both resolution and scaling issues. Use the Fix PDF button to correct either or both of these issues. Fix PDF allows you to increase the resolution of the page and can stretch pages to the correct proportion to allow for accurate scaling of the page. When page files are imported into TradeTek, they are converted

to PNG files. If one of the PNG files is too large, it can cause various problems. To resolve the issues caused by big image files, from the Fix PNG or JPG Images tab, read the provided information to understand how the process works, then click the OK button to run the process.
- **Capture Text**: Click the Capture Text button to scan an area of text on the page and convert it to text that can be pasted into other applications like Excel or Word. Once an area has been successfully scanned, the converted text is placed in the clipboard. Select the **Text in Dialog** radio button to have the text displayed in a dialog box, **Clipboard Beep** to trigger a sound when the text is captured or **Show Text Editor** to place the captured text in a text editor. Set the appropriate **AI Engine** radio button to power the process. Click the **OK** button to select a page region area and then scan all of the pages in the job into text that can then be searched. From the **Scan all Pages and PDF Files for** Search tab, click the **Scan** Pages button to capture text from all pages in the currently opened job. Click the **Text from PDF** button to scan an external PDF file into text that can then be searched. Click the **Clear Scans** button to clear all stored text from previous scans. Click the **Search** button to perform a search on previously scanned text.

Estimating Tab

Side Panels

The left side Estimating Layout side panel is where the default and user added estimating layouts are located. Select the estimating layout that you want displayed in the estimating area.

The Estimating Layout side panel contains 7 related buttons:

- **Add Layout**: Click the **Add Layout** button to add a new estimating layout. Give the new layout a name and select the property value columns that you would like displayed in the layout from the **Add Column Name** drop-down menu. The list of available property values is generated from all properties located in assembly groups within the **Template** tab, the **Set Default Properties** area and takeoff items within the **Estimating** tab. Once you have added all the desired property value columns, click **OK** to add the new layout.
- **Property**: Launches the layout dialog for the selected layout allowing you to make changes.
- **Delete:** Deletes the selected layout.
- **Import Layout**: Imports an estimating layout that has been exported from another computer.
- **Export Layout**: Exports the selected estimating layout file to the Desktop that can be imported by another computer.
- **Up & Down Arrows**: Moves the selected layout up or down in the list.

The right-side panel displays the **Template** side panel. For more information regarding the **Template** side panel, refer to its section under the **Home** tab.

The main **Estimating** area is where all takeoff for the opened job is located. The **+** and **-** buttons to the left of folders and takeoff items allow you to expand or collapse the item making its sub-items visible or invisible. Click the **Fill** button to batch fill property values by selecting the property from the drop-down menu, typing in the new value then selecting the appropriate items to update. The **Search** field at the top right corner of the **Estimating** area allows you to type characters that are matched against the takeoff item names, reducing the number of visible items to help find takeoff items faster. Click the **Find** button to search all items in the **Estimating** tab for the entered text in the selected item. Click the **Delete** button to delete multiple takeoffs or assemblies at one time. Set the **Reorder** check box to allow items to be moved around in the main Estimating area.

Estimate Button Group

The **Estimate** button group located at the top of the **Estimating** tab contains the following buttons related to **Estimate** area actions:

- **New Folder**: Adds a new takeoff folder to the estimating area. Takeoff folders can contain properties that can be accessed by the takeoff items inside of the folder. For more information on takeoff folder properties refer to the **Properties** section of the user's guide. When a new folder is added, it will be added beneath the last item in the estimating area. To move takeoff items into a folder, left click + hold on the takeoff item icon and drag the item below the folder. To move an item out of a folder, click and drag it above the folder. Folders can be moved up or down in the estimating area by left click + hold on the folder icon and dragging it to the desire position.
- **Delete**: Deletes the selected item(s) in the estimating area.
- **Edit**: Launches the selected takeoff item dialog.
- **Expand All**: Expands all folders and assemblies in the estimating area so that all sub-items are visible.
- **Collapse All**: Collapses all folders and assemblies in the estimating area so that all sub-items are invisible.
- **Export Data**: Exports the data in the **Estimating** tab to CSV or Excel. Click the **More Options** button to select specific columns and change the export file type.
- **Add Manual**: Click to add a manual assembly to the job. Select the appropriate manual assembly from the drop-down menu. You can also add a manual assembly to the job from the **Estimating** tab by double-clicking on it in the **Template** right side panel.
- **Folder Preset**: An Estimating tab folder structure can be created in the currently opened job and then stored for later use. Create the desired folder structure in the currently opened job, then click the **Folder Preset** button and click the **New** button to add a new structure. To add the new structure to a new job, from the Estimating tab click the **Folder Preset** button, select the desired preset then click the **Apply** button.

Clipboard Button Group

- **Copy**: Copies the selected item(s) in the estimating area to the clipboard.
- **Paste**: Pastes the items in the clipboard into the estimating area.

List Tab

Lists with multiple columns can be created that properties can be connected to. Takeoff folder and takeoff tool properties can be connected to a single column list to create a drop-down menu to choose values from. Assembly sub-items can be connected to multiple column lists and when the sub-item name is chosen from the drop-down menu, other properties in the sub-item that have the same name as a column name in the list will be updated from the data in the other columns for that item. If an assembly sub-item property has the same name as a connected list column name, but you do not want that property value updated (you want to enter the property value manually) type the word IGNORE for that property value in the connected list.

Side Panel

The left side List side panel is where the default and user added lists are located. Select the list that you want displayed in the list area.

The List side panel contains 7 list related buttons:

- **Add List**: The Add List button launches the **List Layout** dialog, allowing you to either add a local list or connect to an external list. You can add a local list and create the entire list all within the application or connect to an external list file and import the list. With an external list, the connection to the source file is maintained so that when updates are made to the file, the list in the application can be updated. In the **List Name** field relace the **New List Layout** text with the name of your new list and then choose either **Local** or **External** list type:
  - Local List: Add the desired columns by choosing them from the **Add Column Name** drop-down menu and click the **OK** button to create the list.
  - External List: Choose the type of file that you will be connecting to:

    CSV files can optionally be password protected. This allows you to either allow access to lists by other users or send lists to other users that require a password to connect to or import in. We recommend the use of .csv files for external lists when possible because there is a little more capability in the application when working with .csv files as opposed to other file types.

    - CSV File On Disk – Connect the list to a .csv file that is located on your computer, on a server, in dropbox or any other drive or folder that you can choose from. To connect the list, choose the **CSV File on Disk** radio button and click the **Select** button at right, navigate to and select the list file. See **List Layout Dialog** section below for further instructions. To ensure that non-ASCII special characters are supported, save the CSV file as a CSV UTF-8 file type.
    - CSV File at URL – Connect the list to a .csv file that is located on a website. To connect the list, choose the **CSV File at URL** radio button, type the exact url into the URL field and click the **Load URL** button. See **List Layout Dialog** section below for further instructions. To ensure that non-ASCII special characters are supported, save the CSV file as a CSV UTF-8 file type.
    - ODBC Connection – Connect the list using an ODBC connection that will allow you to create a database connection to a Microsoft Excel Workbook, Microsoft Access Database file and any other database file that is supported by Microsoft ODBC. To connect the list, choose the **ODBC Connection** radio button and click the **Select** button to launch the **ODBC** setup dialog, then do the following:
      1. Click the **Databases** button to create a new database connection.
      2. In the next dialog, click the **Add…** button to add a new database connection.
      3. In the **Create New Data Source** dialog, choose the appropriate ODBC driver that supports the file type of your database file. If you don't see the file type in the list that you need, proceed to step 4, otherwise proceed to step 5.
      4. Cancel the last 2 dialogs and on the **ODBC**, dialog click the **Install ODBC Driver** button at the bottom left corner and follow the prompts. This will install the latest version of Microsoft's ODBC driver for Windows users and will install a 3rd party ODBC driver for Mac users. If you are connecting to a file type that is not supported by the standard driver, you may be able to obtain an OBDC driver for that specific file type that will allow this connection to work. Return to step 1.
      5. Select the appropriate file type from the list and click the **Finish** button.
      6. In the next dialog, name the new dialog source and make the required selections depending on your file type, then click the **OK** button to add the data source.

7. You should now see your newly defined data source in the **User Data Sources** list. Click **OK** to dismiss the dialog.
8. In the **ODBC** dialog click the **Select** button and choose the data source that you want to connect this list to.
9. If connecting to a Microsoft Excel workbook or spreadsheet, check the **Excel Workbook** check box in the **ODBC** dialog.
10. Click the **Connect** button in the **ODBC** dialog.
11. Choose the sheet or table in the **Select Table** list to create the new list from then click the **OK** button to import the list. Even if there is only 1 option, you must select it before proceeding to step 12.
12. See **List Layout Dialog** section below for further instructions.

- TradeTek Cloud – Connect the list to a cloud list that has already been created in the cloud. Click the List Name button then choose the appropriate cloud list to connect to.

- List Layout Dialog: Once the data source connection has been made, the **List Layout** dialog will be presented in the **Preview** tab. You can scroll horizontally and vertically to preview the data from the connected source to verify the connection. Click the **Setup** tab at the top left corner of the dialog and perform the following steps:
    1. You will need to map (connect) the columns that you add in the internal list to the appropriate columns in the database file. You can either choose to select the database file columns by column number or by column header name. Make your selection by setting either the **Number** or **Name** Map by Column radio button.
    2. If your database file does not contain column header row names in row 1, check the **Ignore Header Row** check box and set the **Map by Column** radio button to **Number**.
    3. Add columns to the internal list by clicking the **Add Column Name** drop-down menu and selecting a property name. By default, the **Name** column is added to each new list. Internal list column header names must match existing property names that exist either in an assembly in the **Template** tab, a takeoff tool in the **Set Default Property** tab, or a takeoff item in the **Estimating** tab. The properties will only be available to choose from the column name drop-down menus once they have been added as a property in one of the items mentioned above.
    4. Once all the desired internal columns have been added, click on the first column name and then click the **Map Column** button to connect it to a database file column. Choose either the column number or column name from the source file to connect to.
    5. Repeat step 4 for all added internal column names.
    6. Once all added columns have been mapped, click the **OK** button to complete the connection and create the new list. The new list name will now be visible in left side panel.
    7. **Derived Columns** can be added to external lists. Derived columns allow you to add columns of data where you want to enter the data manually in the list in TradeTek (the data is not coming from the source file). For example, you could add a derived column to an external lumber list called “Coverage” where you could enter the material coverage for that item that you may want to bring into a sub-item property named Coverage that can be referenced in the calculation formula for that item. Derived columns are connected to the value identified as the “Key Property” so that if items get

moved in the list, their derived column values move with them. To add a derived column, select the list and then click the **Property** button to display the List Layout dialog. Click the **Derived Column** button, then click the Add button and follow the prompts.

- **Property:** The **Property** button launches the **List Layout** dialog allowing you to make changes to the selected list.
- **Delete:** Deletes the selected list.
- **Import List**: Imports a list file that has been exported from another computer. Double clicking on a list file will automatically import the list.
- **Export List**: Exports the selected list file to the desktop to be imported by another computer.
- **Archive List**: Archives a copy of the currently selected list file by date.
- **Restore List**: Restores the currently selected list from the chosen archived list file.
- **Up**: Moves the selected list up 1 row in the side panel.
- **Down**: Moves the selected list down 1 row in the side panel.

List Area

To edit a list, click the **Editable** checkbox at the top of the list area and click into the cell that you would like to edit. To edit data in derived columns in an external list, the **Editable** check box does not need to be checked. For multiple column lists set the **Tab** radio button at the top of the list to **Right** and for single column lists set the **Tab** radio button to **Down** to make adding and editing list items faster. To search for an item in the list, type the name of the item into the search box at the top of the list area, choose the column to search in from the drop-down menu and click the **Find** button. Each time you click the button it will proceed to the next match item in the list. To add a row to the list, select a row and click the **Add Row** button and the new row will be added above the selected row. To delete a row, select the row to be deleted and click the **Delete Row** button at the top of the list area. To do a bulk add of data into a list column click the **Fill** button then choose the column name from the drop-down menu, choose the starting and ending rows, type the value to be added then click the **OK** button.

Update Button Group

The **Update** button group located at the top of the **List** tab contains the following buttons related to updating lists and updating properties connected to lists:

- **Update List**: Updates the data in external lists from their source data file.
- **Update Assembly**: Once the data in a list has been updated, all properties that have been connected to that list located in assembly groups in the **Template** tab will be updated.
- **Update Job**: Once the data in a list has been updated, all properties of takeoff items that have been connected to that list in the **Estimating** tab of the currently opened job will be updated.

Clipboard Button Group

The **Clipboard** button group located at the top of the **List** tab contains the following buttons related to copying data in and out of local lists:

- **Copy Table**: Copies all data in the selected list to the clipboard that can then be pasted into other locations, such as a Microsoft Excel spreadsheet.
- **Paste Table**: Pastes all data from the clipboard into the selected local list. For example, you can copy an entire spreadsheet and paste into the selected local list. The number of columns in the copied location must match the number of columns in the local list.

- **Copy Columns:** Launches the **Copy Columns** dialog. Type a number at the top of each column to copy its data and number it to specify the order that you want the individual columns pasted in. Click the **OK** button to copy to clipboard. The columns can now be pasted to another locations, such as an external spreadsheet.
- **Paste Columns**: Once you have copied columns(s) of data from an external source, click to launch the **Paste Columns** dialog. Type a number at the top of each column to specify the order in which to paste each column of data into the selected local list.

Tools Button Group

The **Tools** button group located at the top of the **List** tab contains the following buttons related to protecting external lists created from CSV files and adding property images:

- **Encrypt Decrypt**: Launches the **CSV Encryption** dialog. Create a password using 5 or more characters of A..Z, a..z or 0..9. Click the **Select CSV File** button, navigate to and select the CSV source file of the selected list then click the **Encrypt** button. At this point, any other user that either attempts to connect to the same source file or to import a list file connected to the source file must enter the password successfully to complete the connection or import. You can check the status of a source file by clicking the **Status** button and can decrypt a source file by clicking the **Decrypt** button.
- **Property Images**: Launches the **Property Images** dialog. All images that will be used as a property image must be added here in the property images library first. Property images will typically be displayed in a cell in TradeTek, either in the **Estimating** tab when a column has been added to the Estimating layout to display the column, in a list in the **List** tab when a derived column of type Image has been added to an external list or a column of type Image has been added to a local list, or in a column in a report. In the **Property Images** dialog, choose the image size at the bottom of the dialog, set any of the optional parameters and click the **Add** button to navigate to and select the image to import. When selecting the image import size, keep in mind the size of the area that you intend the image to be displayed, and match the import size to the display size as closely as possible. Once a property image has been imported, it can now be added either as an image property in a dialog, or can be added to an item in an image column of a local list or a derived column of type image in an external list. Once images are added to lists, they will be updated in any assembly sub-items that are connected to that list as with all other property types. To add a property image to a list, click in the cell where you want to add the image, then click the **Property Images** button, click on the desired image then click the **Select button**.

List Connection Button Group

The **List Connection** button group located at the top of the **List** tab contains the following buttons related to linking vendor lists together so that you can easily compare pricing for the opened job:

- **List Map**: Launches the **List Map** dialog. This dialog allows you to connect up to four lists together by mapping like item names so that price comparisons can be generated. In the **Default List** column, choose the desired list and column containing the item names to be mapped. Add up to three additional lists by selecting the list and column containing the item names to be mapped. Click the **Populate Default Values** button at the bottom left corner of the dialog to load the **Default List** item names. For **List 2**, click into the cell at the first row and the item names for that list are populated in the **Find Value** area to the right. Start typing characters to search for an item name and the list narrows based on your search. Select the appropriate matching item to the **Default List's** item for that row, then click the **Set** button at the top right corner to make the selection. Continue through all rows of the additional lists until all item names have been mapped. All mapping is saved so that when you update the lists in the future, including adding or deleting line items, the mapping is retained. If only values have been changed in the lists, there is no need to reload the **Default List.** If new line items have been added to the **Default List**, click the **Populate Default Values** button and map the newly added items. New list maps can be created by clicking the **New Map** button. Navigate between maps by selecting the desired map from the drop-down menu.

- **List Select**: Launches the **Select List** dialog. Select the vendor list to toggle all assembly sub-items in the **Estimating** tab to that list. Click the **Update Job** button located in the **Update** button group in the **List** tab to update all assembly sub-items connected properties with the values from the selected list. You're now ready to print the comparison report for the selected list.
- **Export Map**: Exports the list map to the desktop. You can now share the list map with other users, save as a backup, or create multiple list maps that you can import and use whenever needed. With this capability, essentially there is no limit to the number of vendor lists that you can quickly compare for all of your projects.
- **Import Map**: Imports the selected list map file.

Template Tab

Set Default Property: In this tab you can set and add default properties for all the standard takeoff tools, markup tools, job property and estimating folder items listed in the tab. Launch an items dialog by clicking on its icon and make changes to existing properties or add new properties. From this point on, the changes will be included each time a new instance of the item is created.

Assembly Group: New assemblies can be created and added to assembly groups. By default, 3 assembly groups are included ("Assembly Group 1", "Assembly Group 2" & "Assembly Group 3"). Assembly groups are displayed by clicking the **Assembly Group** drop-down menu at the top of the main assembly area and choosing the group that you would like to display. Move an assembly group up or down in the list by selecting the assembly group and clicking either the up or down arrow to the right of the assembly group drop-down menu. Rename or delete an assembly group by selecting it and clicking the **Rename** or **Delete** button to the right of the arrow buttons. Click the **Fill Property** button to batch fill property values by selecting the property from the drop-down menu, typing in the new value then selecting the appropriate items to update. Click the **Add Property** button to batch add new properties to assemblies in the assembly group by selecting the new property type, select which items to add the new properties to then click the **Property Details** button to type in the property values or calculation formula. Click the **Delete Property** button to batch delete properties from assemblies and or sub-items in the assembly group. Click the **Find** button to search all items in the **Template** tab for the entered text in the selected item. Click the **Change Type** button to change the assembly type between linear and segment. Click the **Delete** button to delete multiple assemblies at one time. Set the **Reordering** check box to allow items to be moved around tin the main Template area.

Main Assembly Area: Property columns can be displayed in the main assembly area. To adjust the column layout, click the Layout button at the top of the main assembly area. In the **Layout** dialog, you can add property columns, delete columns, and change the order of the columns. To add a property column, click the **Add Column Name** drop-down menu and choose the property to be displayed. The drop-down menu displays all takeoff items and sub-item properties that exist in the **Template** and **Estimating** tab. Column widths can be resized by placing the mouse at the header row column dividing line and when the arrow icon displays drag the column edge to adjust its width. Click into a property value cell to change its value.

Side Panel: The right side **Templates** side panel allows you to select an assembly group to be displayed in the side panel.

Template Tools Button Group: The **Template Tools** button group located at the top of the **Template** tab contains the following buttons related to working with assemblies:

- **New Folder**: Adds a new folder to the selected assembly group for the purpose of organizing assemblies. When a folder is added it will be inserted below the last item in the main area. Assemblies can be placed into folders by dragging the assembly below the folder. To remove an assembly from a folder, drag it above the folder.
- **Delete**: Deletes the selected assembly or folder including its contents.
- **Import Group**: Imports an assembly group file that has been exported by another computer. Double clicking on an assembly group file will automatically import the group.
- **Export Group**: Exports an assembly group file that can be imported by another computer.
- **Expand All**: Expands all folders, assemblies and sub-items in the main area so that all items are visible.
- **Collapse All**: Collapses all folders and assemblies in the main area so that all sub-items become invisible.

Clipboard Button Group: The **Clipboard** button group located at the top of the **Template** tab contains the following buttons related to copy and paste of folders and assemblies in the main template area:

- **Copy**: Copies the selected assembly or folder and its contents to the clipboard.
- **Paste**: Pastes the contents of the clipboard into the main template area.

New Assembly Button Group: New assemblies can be created from the 4 standard takeoff tools (Area, Linear, Segment & Count) as well as the enhanced Joist and Beam tools. The only difference between the standard takeoff tools and assemblies is that assemblies allow you to add sub-items which can optionally be connected to lists in the List tab. If you will be using TradeTek in both imperial and metric measurement modes, it is recommended that you create separate assembly groups for each mode. When TradeTek is in imperial mode, some inputs and labels in the dialogs will be imperial in metric assemblies instead of metric as you might expect. When TradeTek is toggled back to metric mode, those metric assemblies will go back to how they were when you created them.

- **Create New Standard Assembly**: To create a new assembly, click the appropriate assembly type from the **New Assembly** button group to launch the new assembly dialog. Name the assembly and click **OK** to add the assembly to the main template area. For more information regarding the **Info** and **Takeoff** tabs, refer to the appropriate takeoff tool in the **Takeoff Button Group** section above. A takeoff folder can be pre-set in the tool by typing the name of a folder to the right of **Default Folder** in the dialog. If a folder by that name exists in the Estimating tab, the takeoff will be placed in that folder. If the folder does not exist, one will be created.
- **Add Assembly Sub-Item**: To add an assembly sub-item, either click on a new assembly button to create an assembly or double click on the icon of an existing assembly in the main template area to launch its dialog and click the **Add Sub-Item** button. When the **Name Tab** dialog presents, name the new sub-item tab and click **OK** to add the new sub-item. You are now in the Sub Item tab and will notice that your sub-item tab name is displayed in the sub-item drop-down menu. You can add multiple sub-items to the assembly by clicking on the **Add Sub-Item** button from either the **Info** or **Takeoff** tabs. You can also add sub-items to other sub-items by clicking on the **Add Sub-Item** button from the **Sub Item** tab. The new sub-item will be added to the currently selected sub-item. All sub-items can be accessed from the sub-item drop-down menu in the **Sub Item** tab. Sub-items to other sub-items are indicated in the drop down menu with ***** in front of the sub-item tab name. Once a sub-item is added to an assembly, you can now input property values, add new properties and can also connect the sub-item to a list. You can re-name or delete assembly sub-items but selecting the appropriate sub-item tab name in the drop-down menu and clicking either the **Rename** or **Delete** buttons to the right. Once multiple sub-items have been added, the order of the sub-items can be rearranged by clicking the **Organize SubItem** button located in the **Info** tab of the dialog. To copy complete sub-items including all of their properties to the same assembly or to different assemblies, click the **Copy To** button at the top right corner of the dialog.

- **Connect Sub-Item to List**: To connect an assembly sub-item to a list, navigate to the **Sub Item** tab in the assembly dialog, select the appropriate sub-item tab name from the drop-down menu and click the **Connect To List** button. When the **Connect To List** dialog presents, select the list and column that you want to connect to the **Name** property of the sub-item. Once connected to a list, the **Name** property value becomes a drop-down menu that allows you to choose an item from the connect list column. Start typing characters in the name of the item that you are searching for to reduce the list size and find items faster. If you choose the wrong item, delete that item from the name field to display the drop-down menu again to choose from. If a sub-item is connected to a list with multiple columns, the other columns of data for the item selected can be updated in the sub-item if their properties have been added. For example, let's say that we have a list with 2 columns (Item Name & Cost Each). If you connect a sub-item to the "Item Name" column and add a number property to that sub-item called "Cost Each", when you choose the sub-item Name property value from the "Item Name" drop-down menu, that items "Cost Each" value from the list will be updated in the "Cost Each" property of the sub-item.
- **Presets**: Presets allow you to create multiple versions of the assembly by predefining unique assembly and sub-item property values for each preset. This eliminates the need to duplicate assemblies to create preset versions. To add a preset to an assembly, from the **Info** tab click the **Presets** button. To add a new preset entry, click the **Add** button at the bottom left corner of the dialog. Enter the new preset name, which will be the assembly name when the preset is selected. To add a default property value selection to a preset, click on the preset name to select it, then click the **Add Default** button. To add an assembly sub-item custom (user added) property value set the **Sub Item Custom Property** radio button. To add an assembly sub-item standard property value set the **Sub Item Standard Property** radio button. To change the sub-item selection from list or name, set the **Sub Item Name** radio button. To add an assembly custom property value set the **Assembly Custom Property** radio button and to add an assembly standard property value set the **Assembly Standard Property** radio button. To define a list for the selected sub-item to be connected to set the **Connected List** radio button. Set the remaining appropriate inputs for each entry, then click OK to add the entry. Preset entries are added one at a time by clicking the **Add Default** button to complete each entry. To use an assembly that has presets assigned, launch the assembly, select the desired preset from the list (the preset name becomes the assembly name) then perform the takeoff as usual.
- **Create New Joist Assembly**: To create a new joist assembly, click the **Joist** assembly type from the **New Assembly** button group to launch the joist assembly dialog. The **Info** tab in the joist assembly is the same as an area assembly. In addition to the takeoff measurements in the **Takeoff** tab of area assemblies, the joist assembly also has **Total Joist Length** as well as **Joist Segment Count** and **Tallies**. These measurements can be accessed in the quantity calculation formula of other properties and sub-items in the assembly.

  In the **Joist** tab, enter the joist material description in the **Joist Material** input (something like 2x10 SYP#2) or connect the generated joists to a list by clicking the **Connect To List** button and selecting the appropriate list name and column to connect to. Choose the generated joist color, select your **Length Calc** preference and set the joist on-center spacing from the **OC Spacing** drop-down menu.

  When the **Convert Short Lengths** checkbox is checked, all generated joists shorter than 8' will be figured out of longer material. 14' joist sub-items will be generated for all 7' long pieces, 10' joist sub-items will be generated for all 5' long pieces and 12' joist sub-items will be generated for all 6', 4', 3', 2' and 1' pieces. The same applies when TradeTek is in metric mode. When the **Convert Short Lengths** check box is checked, short joists are never generated to the **Nearest Even Foot**. You can turn the joist length labels on or off, add a joist waste percentage that will get added to all of your generated joist quantities and can also set checkboxes to add joists at each end of each joist area or add double joists.

Joists are assembly sub-items that get generated on the fly. Any properties that you add in the **Joist** tab will be included in all generated joists from that joist assembly. If connected to a list, the value of any joist sub-item properties that match a column name in a connected list will be updated from the list.

To use a joist assembly, launch it from the Templates side panel, and draw the appropriate joist area(s). Double click in a joist area to present the **Joist/Rafter Tool** dialog. Here, you can draw new joists or rafters, clear the joists or rafters in the selected area or regenerate the joist totals. To draw joists, click the beginning and second point of the reference line to locate the first joist. After the second point is clicked, the remaining joists for the joist area will be drawn in and the appropriate joist sub-items will be generated. To adjust an individual joist, double click on the joist line to present the **Edit Joist** dialog. The dialog displays the actual length of the joists (not including the joist depth that gets added to rafters to account for the angle cut). You can move or resize the joists with the arrow keys (hold down the Shift key for faster movements), delete the joist or duplicate the joist. Any time that you manually adjust an individual joist, be sure to double click in the joist area to re-launch the **Joist/Rafter Tool** and click the **Regenerate Totals** button.

If the joist assembly is connected to a list, when the joist sub-items are generated, the **List Map** dialog will present that shows the generated joist length and allows you to pick the appropriate item from the connected list by clicking in the **List Value** column and choosing the item from the list. Once the list has been presented, type in the search box at the top of the list to narrow the search. Once all presented joist lengths have been selected, click **OK** to proceed with generating the joists. Once you have made a list selection for a joist length, that selection will be stored in memory and automatically applied to any future joists that get generated of the same length from that assembly.

- **Create New Beam Assembly**: To create a new beam assembly, click the **Beam** assembly type from the **New Assembly** button group to launch the joist assembly dialog. The **Info** tab in the beam assembly is the same as the segment assembly. In addition to the takeoff measurements in the **Takeoff** tab of segment assemblies, the beam assembly also has **Total Beam Length** as well as **Beam Segment Count** and **Total Beam Material LF** and **Tallies**. These measurements can be accessed in the quantity calculation formula of other properties and sub-items in the assembly.
- In the **Beam** tab, enter the joist material description in the **Beam Material** input (something like 2x10 SYP#2) or connect the generated beams to a list by clicking the **Connect To List** button and selecting the appropriate list name and column to connect to. Select your **Length Calc** preference, set the number or beam **Plies** (layers of material) and optionally add a bearing value. If **Bearing** is set to 6”, then 6” will be added to each end of your beam segment takeoffs (so you would need to do your takeoff from the inside of the opening on one side to the inside of the opening on the other side).

When the **Convert Short Lengths** checkbox is checked, all generated beams shorter than 8’ will be figured out of longer material. 14’ beam sub-items will be generated for all 7’ long pieces, 10’ beam sub-items will be generated for all 5’ long pieces and 12’ beam sub-items will be generated for all 6’, 4’, 3’, 2’ and 1’ pieces. The same applies when TradeTek is in metric mode. When the **Convert Short Lengths** check box is checked, short beams are never generated to the **Nearest Even Foot**.

Beams are assembly sub-items that get generated on the fly. Any properties that you add in the **Beam** tab will be included in all generated beams from that beam assembly. If connected to a list, the value of any beam sub-item properties that match a column name in a connected list will be updated from the list.

To use a beam assembly, launch it from the Templates side panel, and draw the appropriate segment takeoffs. Double click on an individual beam segment to present the **Beam Tool** dialog, where you can view the actual beam length, regenerate totals, or make a list map adjustment if the assembly is connected to a list. To adjust the length of a beam segment, click on it to make the end points visible, then click and drag a point to adjust the length. Any time you adjust the length of a beam segment, be sure to click the **Regenerate Totals** button.

If the beam assembly is connected to a list, when the beam sub-items are generated, the **List Map** dialog will present that shows the generated beam length and allows you to pick the appropriate item from the connected list by clicking in the **List Value** column and choosing the item from the list. Once the list has been presented, type in the search box at the top of the list to narrow the search. Once all presented beam lengths have been selected, click **OK** to proceed with generating the beams. Once you have made a list selection for a beam length, that selection will be stored in memory and automatically applied to any future beams that get generated of the same length from that assembly.

- **Create New Panel Assembly**: To create a new panel assembly, click the **Panel** assembly type from the **New Assembly** button group to launch the panel assembly dialog, name the assembly, then click **OK** to add it to the **Assembly Group**.
  The following inputs are found under the **Info** tab:
  - Name: Type in the name of the panel takeoff.
  - Panel/Roll: Select for the assembly to be in either **Panel** or **Roll** mode.
  - Trim: If the assembly is in **Panel** mode, set the **Trim** check box to put the assembly in **Trim** mode.
  - Units: Change the quantity value units.
  - Color: This is the color of the takeoff item on the page. Colors are selected randomly by default but can be changed by the user here.
  - Texture: To display a directional texture for each **Panel** or **Roll** piece, set the **Texture** check box.
  - Width: Set the **Panel** or **Roll** width in feet or **Trim** width in inches.
  - Length: Set the **Panel**, **Roll** or **Trim** width in feet.
  - Add Property: Add up to 10 custom properties in the **Info** tab.
  - Refresh: The refresh button will refresh the values of all properties when changes have been made.
  - Folder: If a takeoff folder(s) has been added in the **Estimating** tab, a folder can be selected from the drop-down list for the takeoff item to be placed into. A takeoff folder can be pre-set in the tool by typing the name of a folder to the right of **Default Folder** in the dialog. If a folder by that name exists in the Estimating tab, the takeoff will be placed in that folder. If the folder does not exist, one will be created.

  The following inputs are found under the **Takeoff** tab in **Panel** mode:
  - Area: Displays the area measurement of all combined panel pieces, not including scrapped pieces.
  - Piece Count: Displays the total number of panel pieces.
  - Point Count: Displays the total number of panels.
  - Batten Linear: Displays the total linear measurement of all batten strips.
  - Perimeter Points: Displays the total number of perimeter points of all panel pieces.
  - Perimeter Linear: Displays the total perimeter linear measurement of all panel pieces.
  - Batten Strip: Set the checkbox to turn batten strips on.
  - Batten OC: If **Batten Strip** is checked, set the on center spacing.

  The following inputs are found under the Takeoff tab in **Panel** mode with **Trim** checkbox checked:

- Point Count: Displays the total number of trim panels.
- Piece Count: Displays the total number of trim panel pieces.
- Linear: Displays the total liner measurement of all trim pieces.

The following inputs are found under the Takeoff tab in **Roll** mode:

- Point Count: Displays the total number of rolls.
- Piece Count: Displays the total number of roll pieces.
- Area: Displays the total area measurement of all roll pieces.
- Seam Linear: Displays the total linear measurement of all seams.
- Perimeter Points: Displays the total number of perimeter points of all roll pieces.
- Perimeter Linear: Displays the total perimeter linear measurement of all roll pieces.

Adding sub-items to a panel assembly works the same way as adding them to all other assembly types (see **Add Assembly Sub-Item)** above.

- **Panel/Trim Mode Takeoff**: Launch the Panel assembly and click to add a panel to the page. Drag the panel to the desired location on the page. To cut or modify a panel piece, double click on the panel piece to display the **Panel and Roll Tools** dialog with the following buttons:
  - Horizontal Cut: To make a horizontal cut click the button and then click the location of the cut.
  - Vertical Cut: To make a vertical cut click the button and then click the location of the cut.
  - Angle Cut: To make an angle cut click the button and then click the first point of the angle somewhere inside of the panel, draw the angle line and then click the second point somewhere inside of the panel.
  - Corner Cut: To make a corner cut click the button and then click the first point at the inside corner location of the cut, then click the second point towards the outside corner of the cut.
  - Trace Cut: To cut an irregular shape click the button and then click the first point somewhere near the edge of the panel, draw the irregular line and then click the final point near the edge of the panel.
  - Inside Cut Out: To make an inside cutout, click the button then click the first point, draw around the perimeter of the cutout area and then click the final point close to the first point.
  - Undo Action: Click the button to undo the previous action in the dialog.
  - Align Corners: When this check box is checked, when a panel, trim or roll piece is dragged close to another piece it will snap into place against that piece.
  - Rotate 45 Left: Rotates the piece 45 degrees to the left.
  - Rotate 45 Right: Rotates the piece 45 degrees to the right.
  - Rotate 90 Left: Rotates the piece 90 degrees to the left.
  - Rotate 90 Right: Rotates the piece 90 degrees to the right.
  - Rotate 180: Rotates the piece 180 degrees.
  - Arrow Key Rotation: Rotates the piece by tapping the **Arrow** keys. Hold down the **Shift** key for faster movement.
  - No Rotation: Resets the piece to its original orientation.
  - Delete Panel: Deletes the panel along with all its associated pieces.
  - Delete Takeoff: Deletes the entire assembly including all panels and pieces.
  - Scrap This Piece: Scraps the selected piece and deducts its associated takeoff measurements (does not reduce panel count).
  - Move To Page: To move the piece to a different page, click the button, navigate to a different page and then click somewhere on the page.

The additional buttons below are visible when in **Roll** mode:

- Add Seams: Click the button, then draw the linear takeoff at all seam areas.
- Delete Seams: Click the button, then click on a seam line to delete it.

– **Create New Manual Assembly**: To create a new manual assembly, click the **Manual** assembly type from the **New Assembly** button group to launch the manual assembly dialog, name the assembly, then click **OK** to add it to the **Assembly Group**.

  Manual assemblies can be created and used for adding items to the job that do not require a takeoff to generate the item quantities (quantities are already known). For more information regarding adding sub-items and properties to Manual assemblies, see the **Create New Standard Assembly** section above. A takeoff folder can be pre-set in the tool by typing the name of a folder to the right of **Default Folder** in the dialog. If a folder by that name exists in the Estimating tab, the takeoff will be placed in that folder. If the folder does not exist, one will be created.

– **Batch Buttons**: The Batch buttons allow bulk property changes to be made to assemblies in the Template tab.
  - Fill Property: Select the property from the drop-down list to edit, then type in a value in the **Value** field. Once executed, all the existing properties in the currently selected assembly group will be updated. To update properties in all assembly groups, check the **All Assembly Groups** check box. Select the desired assemblies to be updated or click the **Select All** button to update all assemblies in the group.
  - Add Property: Set the appropriate new property type radio button. Set the appropriate **Apply To** radio button. Click the **Property Details** button to create and set up the new property. Once executed, the new property will be added to all assemblies in the currently selected assembly group. To update properties in all assembly groups, check the **All Assembly Groups** check box. Select the desired assemblies to be updated or click the **Select All** button to update all assemblies in the group.
  - Delete Property: Choose the appropriate property to be deleted from the drop-down menu. Set the appropriate **Apply To** radio button. Once executed, the property will be deleted from all assemblies in the currently selected assembly group. To delete the property in all assembly groups, check the **All Assembly Groups** check box. Select the desired assemblies to be updated or click the **Select All** button to update all assemblies in the group.
  - Change Type: Allows you to change a linear assembly to a segment assembly or a segment assembly to a linear assembly (set the appropriate radio button). Once executed, the property will be changed in all assemblies in the currently selected assembly group. To change the property in all assembly groups, check the **All Assembly Groups** check box. Select the desired assemblies to be updated or click the **Select All** button to update all assemblies in the group.

Report Tab

Reports can be created that will organize and display takeoff data from the **Estimating** tab with multiple export options.

Left Side Panel

The left side **Report Files** panel is where all created report files are located. Click on the report name to display the report in the main area.

The Report Files side panel contains 8 report related buttons:

- **Add Report**: Click this button to create a new report file. In the **Name Report** dialog, give the report a name and then click **OK** to create the report.
- **Clone Report**: To clone (make a copy) of an existing report, select the report in the **Report Files** side panel then click the **Clone Report** button. Name the cloned report, then click **OK** to create the new report.
- **Property**: To rename an existing report, select the report in the **Report Files** side panel then click the **Property** button. Rename the report, then click **OK** to save the change.
- **Delete**: To delete an existing report file, select the report in the **Report Files** side panel then click the **Delete** button.
- **Import Report**: To import a report file that has been exported from another computer, click the **Import Report** button, navigate to and select the report file to be imported, then follow the prompts. Double clicking on the report file will automatically import it.
- **Export Report**: To export a report file to be imported by another computer, select the report in the **Report Files** side panel then click the **Export Report** button and follow the prompts.
- **Up:** To reposition a report in the side panel list by moving it up one row, click the **Up** button.
- **Down**: To reposition a report in the side panel list by moving it down one row, click the **Down** button.

Build Tab

Select a report in the **Report Files** side panel then click the Build tab at the top of the main area to display the selected report. The **Build** tab is where the report layout is created. New report layouts are initially created with 5 columns and 20 rows, these numbers can be adjusted as needed.

Most reports will consist of a header area, group area (where job data is displayed) and summary area on the last page. It's best to think about laying out reports from the top down. Set your column widths based on the job data that will be displayed in each column, then create your report header with any logos, images, text labels, address display area or any other company information. Once the header is complete, then add the group body (with optional page footer) and then add any sub-totals or totals in the summary area.

Right Side Panel

The right side **Report Tools** panel is where all report tools are located that are used to construct report layouts. Check the **Zoom In** check box at the top right corner of the side panel to increase the zoom level of the report page. The **Report Tools** panel contains that following tool groups:

- **Page Setup**: Set the page size by selecting a pre-defined size from the drop-down menu or select **Inches** or **MM** then enter a custom page width and height in the **W** and **H** inputs. Set the page margins, orientation and change the number of columns and rows in the layout.
- **Cell Property**: Set the selected cell format, fill color, text color, cell borders, text type, size and formatting, vertical and horizontal justification, add an image, merge cells and row and column width adjustment (<u>*hold down the Shift key for faster adjustment*</u>). Check the **Resize All Cells** check box to change all row and column widths at the same time.
    - <u>Add Image:</u> To add a report image, select the top left cell of the desired image location and select the appropriate image from the **Report Images** library. Report images must be added to the **Report Images** library before they can be added to a report.
- **Group Box Items**:
    - <u>Group Button:</u> The **Group** button launches the **Report Group** dialog. A report must have at least a level 1 group defined and can optionally have up to 3 nested levels of grouping. Report items are grouped based on property values that exist in each line item in the report. For example, if you want to create a report that is grouped by building, level, and room, the first step is to be

sure that all items that will appear in the report from the Estimating tab have “Building”, “Level” and “Room” properties added with the appropriate values. Next, at the top right corner of the **Report Group** dialog, start with the **Level 1 Property** drop-down menu to select the top level *they must first be added to either an assembly in the **Template** tab or to one of the takeoff tools in the **Set Default Property** tab of the **Template** tab.* In our example above, the level 1 group property would be the “Building” property, the level 2 group property would be the “Level” property and the level 3 group property would be the “Room” property.

By default, the level 1, 2 and 3 labels will display the group instance names at the top of each group. For the example given above, the display format would be Building – Level – Room. It’s also possible to add text to the left or right of **[PropertyValue]** at each level’s label or replace it all with text.

To the right of each **Property** drop-down menu is its **Filter** button. Property filters allow you to choose the property values that will be displayed in the group. Using the above example, the “Building” property may have multiple values like “Building 1”, “Building 2” and “Building 3”. Likewise, the “Level” property may have values like “Level 1”, “Level 2” and “Roof” and the “Room” property may have values like “Kitchen”, “Living Room” and “Dining Room”. Click the **Filter** button to the right of each **Property** drop-down menu and check all the property values that you would like to be included in the report. If the **Auto Alphabetize** checkbox is checked, all report group values will always be automatically alphabetized in the report. If the **Auto Select All** checkbox is checked, all existing report group values will always be automatically selected.

The report group area consists of a group header, group body and optional group footer. All information inside of the group area is included in each generated instance of the groups in the report. In the **Header Rows** drop-down menu, choose the total number of rows to be included in the header area. To the right of the **Header Rows** menu in the **Data Row** drop-down menu, choose the relative header row number that the group instance property label will be displayed in. You can also add cell formatting, formatted text or reference property values in any open cells in the group header.

In the **Body Rows** drop-down menu, choose the total number of rows to be included in the body area. Typically, this will be set to 1. To the right of the **Body Rows** menu in the **Data Row** drop-down menu, choose the relative body row number that the data will be displayed in. You can also add cell formatting, formatted text or reference property values in any open cells in the group body.

In the **Column Property** area of the dialog, select a report column from the **Column** drop-down menu and then select the Property to be displayed in that column in the group body. For example, you might choose column 1 and select the “Name” property, then select column 2 and select the “Qty” property. In this example, the “Name” property values for all items in the report will be displayed in column 1 and the “Qty” property values for all items in the report will be displayed in column 2.

The group area can optionally include a group footer. In the **Footer Rows** drop-down menu, choose the total number of rows to be included in the group footer. If a group footer is not desired, set the **Footer Rows** to 0.

In the **Start Row** drop-down menu, choose the starting row in the report for the group area.

If the **Consolidate Quantities** check box is checked, the quantities of all like items will be combined. In order for items to be consolidated, all property values in the report body columns displaying text properties must be identical.

If the **Roundup Quantities** check box is checked, all quantity values displayed in the “Qty” column will be rounded up to the nearest whole number.

If the **Hide Group** check box is checked, all group areas will be hidden in the View tab of the report.

Group body row numbering can optionally be added. Row numbers will be displayed in column 1 and the column cannot be used to display any additional data (the first available data column will be column 2). If group body row numbering is desired, in the **Column 1 Row #** area of the dialog, select either the **Per Group** or **Per Report** radio button. If **Per Group** is selected, the group body numbering will start back over at 1 in each report group instance. If **Per Report** is selected, the group body numbering will run continuously through all group instances of the report.

Horizontal group body calculations can optionally be added in a column. For example, if the “Qty” property values are displayed in column 2 and the “Cost Each” property values are displayed in column 3, you may want to set up an “Extended Cost” horizontal calculation to be down menu choose the column where the calculated values will be displayed. In the **Select** drop-down menu choose a property value to be inserted into the calculation formula and click the operator buttons to insert an operator into the formula. In the example mentioned above, the horizontal calculation formula might be **{Qty} * {Cost Each}**.

Group footers can optionally include group sub-totals. In the **Footer Subtotals** area of the dialog in the **Column** and **Row** drop-down menus, choose the column and relative footer row where the calculated sub-totals will be displayed. Set the **Include SubTotal** check box to display sub-totals and un-check to hide them.

Group items can be displayed in alphabetical order by checking the **Alphabetize By Column** check box and selecting the appropriate column number.

- Filter Button: The **Filter** button launches the **Filter Group Body** dialog. In the **Filter Group Body** dialog, you can enter conditional statements that when evaluated to true will filter that item out of reports. For example, it’s common to want all sub-items of an assembly to display in a material report, but not the assembly itself. To accomplish this, you could add a text property to your assemblies called “Filter” with a value of “Yes”. Now you can add the filter “Filter=Yes” in the **Filter Group Body** dialog and all your assemblies will now be filtered out of the report.

To add a conditional statement, choose a property name from the **Name** drop-down menu. Remember, in order for a property name to be available in the menu it must exist either in an assembly or assembly sub-item or in one of the takeoff tools in the **Set Default Property** tab. Next, click on one of the operator buttons to add to the statement (=, <>, <, >), in the **Property Value** input type the property value that will evaluate to a true statement, then click the **Add** button at the bottom left corner of the dialog to add the conditional statement then click **OK** to close the dialog. To delete a conditional statement, select the checkbox to the left then click the **Delete** button.

- <u>Prop Value Ref Button:</u> The **Prop Value Ref** button launches the **Property Value Reference** dialog. This will allow you to display the value of a property in the group header, body or footer. Set the appropriate **Group Section** radio button. In the **Column** and **Row** drop-down menus, select the relative group body, header or footer column and row where the value is to be displayed and optionally add prefix or suffix text to be displayed before or after the property value. Click the **Add** button to add the property value reference to the cell. To clear the cell select it, click the **Prop Value Ref** button, and then click the **Delete** button. Keep in mind, when adding a property value reference to a group header or footer, the property value for all items within that group should be the same.

– **Page Items**: Page items can be added above or below the group body area (not within the group body). To display an address from the **Address Book**, click the top left starting cell and then click the **Address** button. Displaying an address requires 4 available rows. You can optionally add a page footer that will be displayed at the bottom of all PDF reports by clicking the **Page Footer** button and selecting the desired number of page footer rows. Any page items that are added to the page footer will be displayed at the bottom of each page in PDF reports. Select a cell and then click the **Date**, **Time**, **Page #**, **Total Pages**, **Page # of Total Pages #**, **User, Job Name** or **Job Note** display those values in the selected cell. To add text to a cell, click the **Text** button and type the desired text into the **Page Item Text** dialog. To add a formula to a cell that will display a calculated value, select the appropriate cell, then click the **Formula** button. Click the **Select Function** drop-down menu to add a value to the equation and click the operator buttons to add an operator to the equation. If the report has generated sub-totals, all sub-total instances are individually available to choose from.

  For example, If the report has only 1 level of grouping by “Building”, the available sub-total functions will look like {SubTotal,Col,Row,Building 1} and {SubTotal,Col,Row,Building 2}. Once you have added the appropriate sub-total to the formula, replace the **Col** and **Row** inputs with the relative group footer column and row numbers where the sub-total is displayed in the group body. The column and row numbers must match the input used in the **Group** button at the **Footer SubTotals** area. Select the {All SubTotals (*column number)*} function to reference the sum of all generated sub-total instances in that column. To reference the value of an individual cell, select the {Column,Row} function.
  The **Connectors** button will allow you to grab a calculated value from one report and display it in another report. While in the report that the shared value is coming from, in the **Outputs** tab, double click in the **Shared Name** column and type a name that the value will be stored under. Set the column number and row number where the shared source value is located. While in the report that the shared value is to be displayed, from the **Inputs** tab, click in the first available **Click to Assign Report** row. In the **Select Report** drop-down menu, choose the source report where the value is coming from, then from the **Select Name** drop-down menu, choose the name of the value to be displayed. Set the column and row number of the desired cell that the value will be displayed in, then click **OK** to dismiss the dialog.

Connected report values can also be stored as **Global Properties** that can then be referenced in formulas throughout the software. First, create a global property by clicking the **Global Properties** button in the **Report Actions** button group in the **Report** tab and typing in a property name. Leave its property value blank and then click the **OK** button to save and dismiss the dialog. Next, when creating an input or output connector, type the name of the variable that you added as a global property with "GBL:" in front of the property name. For example, if you create a global property called "Bid Total" that you want to store a connected report value in you would need to name the input or output connector "GBL:Bid Total". With report connectors, each time a report is generated the newly generated value is re-saved updating the value in all appropriate areas. Because of this, depending on how connected values are used it may be necessary to generate reports in a specific order to ensure that all associated values are updated correctly.

- **View As:** Set the **View As** radio button to either **Excel**, **CSV** or **PDF** depending on how you want to export the report. In the **View** tab, you see a preview of what the report will look like when exported to the selected format. Keep in mind that csv files store unformatted data only. When a report is exported to Excel, TradeTek does not break the report into pages but rather exports a continuous report into the spreadsheet. Once you have exported to Excel, you can at that point break the report into pages if desired. If you are using a 4K monitor, you may need to adjust the scale in Excel to fit the page size. To adjust the scale, go to the Page Layout tab in Excel and in the Scale to Fit button group adjust the scale appropriately. Report page footers are only included in reports that are exported to pdf.

Report Actions Button Group

The **Report Actions** button group contains the following buttons related to report actions:

- **Address Book**: The **Address Book** stores a list of contacts that can be displayed in reports. To add a new contact, click the **Add** button and enter up to 4 lines of text for each contact. The selected contact will be displayed in one column of the report in 4 contiguous rows.
- **Export Excel**: From the **View** tab, click this button to export the selected report into an Excel spreadsheet. _*Before exporting to Excel, Macros must be enabled.*_ In Windows, perform the following steps ensure the Macros are enabled:
  1. Launch Microsoft Excel and open a blank workbook.
  2. From the File menu on the left, scroll down and click on Options.
  3. Select Trust Center and then click on Trust Center Settings.
  4. Select Macro Settings panel and click the Enable All Macros radio button.
  5. Select Trusted Locations panel and set the Allow Trusted Locations checkbox.
  6. Click OK twice to close the Trust Center. Now quit Excel.

  On macOS, perform the following steps to ensure that Macros are enabled:
  1. Launch Excel and select Preferences from the Excel menu.
  2. On the Security panel, set Enable All Macros and then quit Excel.
  3. If the settings fail to take effect the first time, repeat steps 1 and 2.

  When the report is exported to Excel, a copy is automatically saved to your desktop.
- **Export CSV**: From the **View** tab, click this button to export the selected report into a CSV file (no formatting is retained). When the report is exported to CSV, a copy is automatically saved to your desktop.
- **Export PDF**: From the **View** tab, click this button to export the selected report into a PDF file. When the report is exported to PDF, a copy is automatically saved to your desktop.

- **Copy CSV**: From the **View** tab, click this button to copy the data from a CSV report into the clipboard. This will most often be used in conjunction with integration plugins that send takeoff data from TradeTek to another application.
- **Report Images**: Launches the **Report Images** dialog. All images that will be used as a report image must be added here in the report images library first. Click the **Add** button to launch the **Image Editor** dialog and add a new report image. In addition to adding single images, the **Image Editor** dialog allows you to construct a logo with an optional foreground and background images, border formatting, background fill color and up to 4 separate lines of text. When the **Image Editor** dialog is launched, a sample logo is displayed with a background fill color, border edge formatting and 4 lines of text. The **Image Editor** dialog contains the following inputs:
    - At the **W x H in Inches** input, set the overall width and height of the image or logo.
    - If a background fill color is desired, check the **Fill Color** check box, then choose the color from the color box.
    - If an image or logo border is desired, choose the appropriate border from the **Border** drop-down menu then choose the border color from the color box.
    - Choose the desired overall image or logo transparency from the **Transparency** drop-down menu.
    - To add a **Background Image** click the **Select** button to select the image and then set the **Top** and **Left** positions in inches. Then, set the **Width** and **Height** of the image. To delete a background image, click the **Delete** button.
    - To add a **Foreground Image** click the **Select** button to select the image and then set the **Top** and **Left** positions in inches. Then, set the **Width** and **Height** of the image. To delete a background image, click the **Delete** button.
    - Optionally add up to 4 lines of text. Set the text line 1, 2, 3 or 4 radio button to adjust that line of text's **Top** and **Left** positions, font style and size, font color, vertical orientation, and font formatting.
    - To simply add a single image, add it as foreground or background image.

Store Tab

Welcome to the TradeTek store. Here you can purchase or download free plugins or bundles. Plugins are typically applications that create an integration between TradeTek and another application. Bundles are groups of lists, reports and assembly groups that have been configured to work for a specific trade group. In the left side column, you'll see a list of plugins (add-ons) and bundles that have been developed either by a 3rd party developer or by TradeTek. Some plugins or bundles may be free to download, and some may be purchased either directly from the plugin store or from a 3rd party developer's website. Click on a plugin or bundle in the left side panel to view details and to purchase and / or download.

As a user, you can create a bundle containing assembly groups, lists and reports to share with other users for free or to sell in the TradeTek store.

Bundles Button Group: The Bundles button group located at the top left of the Plugin tab contains the following buttons related to bundles:

- **Build Bundle**: Click the **Build Bundle** button to launch the **Build Bundle** dialog. Up to 20 bundles can be installed in TradeTek at one time. To create a new bundle, select the first available slot. Complete the following steps to generate your bundle file:
    - **Step 1**: Name the bundle and add the version number. To delete a bundle, click the **Delete** button.

- **Step 2**: You can either distribute your bundle for free or apply a lifetime license to it. To distribute it for free, set the **Free to Use** radio button. To apply a lifetime license, set the **Lifetime** radio button and select the ticket file and security code received from Excel Software (licensing company). For more information on how to set up licensing and sell your bundles in the TradeTek store, see the **API Guide** in the **Developer Help** button group of the **Help** tab.
- **Step 3**: Set the appropriate check boxes for the folder properties, assembly groups, lists and reports to be included in the bundle. Keep in mind that when folder properties are added, unique tags are created that identify those folders to the software (rather than the folder names) so simply re-naming a folder property does not change how the software references that property. Re-naming a folder property does not change its unique tag.
- **Step 4**: Enter the bundle details that will be displayed when a bundle is installed or sold in the TradeTek store. Add an optional left and right side description. If you will be distributing the bundle in the store, add a bundle icon image. Add the required vendor information (Contact, Phone Number and email address) and an optional website url. Optionally select a user guide pdf file or enter a url to a pdf file. Optionally add a user guide video url.

Click the **Build** button to create your bundle file. The file will be saved to your desktop and can now be imported into TradeTek by clicking the **Manage Bundle** button.

- **Manage Bundle**: Click the **Manage Bundle** button to launch the **Select Bundle** dialog. Navigate to and select the appropriate bundle file (file with extension .ttbundle). From the **Manage Bundle** dialog, click the **Import** button to import a bundle. Click the **Details** button to view the details of a bundle. For a licensed bundle, click the **License Options** button to view your license information, release or restore your license or perform a remote reset. For a licensed bundle, click the **License Reset** button to reset the license using a reset code provided to you by Excel Software (licensing company).

To submit your bundle to the TradeTek store, refer to the **Store Upload** section of the **Developer Guide** for instructions.

Manage Plugins Group: Click the **Import** button to import a plugin file. Click the **Remove** button to remove an installed plugin. Click the **Details** button to view the details of all installed plugins.

Installed Plugins Group: Displays all installed plugins.

TradeTek's easy to use API makes it simple for developers to create plugins to set up integrations between TradeTek and other software applications or create custom functionality within the software. For more information regarding developing plugins, in the **Help** tab in the **Developer Help** button group, you'll find the API Guide along with some developer help videos that explains how to access and utilize the API and how to create internal plugins or external applications that can access the API.

If you have an idea for a plugin that you would like to see developed, let us know by clicking the **Help** tab then clicking the **Feedback** button.

Help Tab

In the main area of the **Help** tab, you'll find our company contact information, a link to the TradeTek website, a link to some frequently asked questions and the TradeTek system requirements.

General Button Group: The General button group located at the top of the Help tab contains the following buttons related to general functions:

- **Feedback**: Click the **Feedback** button to ask us a question, make a suggestion or report a bug. We will make every effort to respond within 24 hours.
- **Download**: Click the **Download** button to download the document that is displayed in the main area at the time.
- **Check For Update**: Click to check for software updates to ensure that you are running the latest version of TradeTek.

User Help Button Group: The **User Help** button group located at the top of the **Help** tab contains the following buttons related to user help resources:

- **Takeoff Basics**: Click to display a short textbook for beginners that explains the advantages of utilizing modern takeoff and estimating software.
- **User Guide**: Click to display the TradeTek user guide. Click the **Download** button to download a PDF copy of the user guide.
- **Training Videos**: Click to access the training video library. Choose a category in the Category column to display the list of related videos in the Video column, then click the desired video to play it. By default, all videos will play in the main area of the **Help** tab and may be smaller than you would like. To play all videos in your default web browser instead of within TradeTek, from the **Preferences** located in the **File** drop-down menu check the **Play Videos in Default Web Browser** check box.
- **Screen Share**: This button is used to initiate a zoom screen share for technical support or training with TradeTek Software. While on the phone with a TradeTek support representative, enter the meeting name provided to start the screen share session.
- **File Share**: This button delivers uploaded files using temporary cloud storage to anyone with a web browser. Once files are uploaded, a token number as well as a url link is provided to access the uploaded file.

Developer Help Button Group: The **Developer Help** button group located at the top of the **Help** tab contains the following buttons related to developer help resources:

- **API Guide**: Click to display the API user guide. Click the **Download** button to download a PDF copy of the API Guide.
- **Developer Videos**: click to access the developer video library. Choose a category in the Category column to display the list of related videos in the Video column, then click the desired video to play it. By default, all videos will play in the main area of the **Help** tab and may be smaller than you would like. To play all videos in your default web browser instead of within TradeTek, from the **Preferences** located in the **File** drop-down menu check the **Play Videos in Default Web Browser** check box.

Developer Tab

By default, the **Developer** tab is deactivated. To activate the **Developer** tab, from the **Preferences** dialog located in the **File** drop-down menu check the **Developer** check box. The API check box must also be checked to turn on the application API.

For more information, see the **API Guide** in the **Developer Help** button group of the **Help** tab.

TradeTek Cloud

Cloud Setup: To access the **TradeTek Cloud Setup** dialog, click **File** at the top left, click **Preference** then click the **TradeTek Cloud** button. The cloud setup dialog is typically accessed by the person designated as the TradeTek administrator for the company. All other users will access cloud via the portal dialog which is mentioned in more detail below. The setup dialog allows the admin to add users, create and upload preference bundles, adjust company settings, create new job entries, upload and manage database lists, create and manage budgets, create and manage invoices, create and manage company contacts, post messages and view activity logs.

When logging into the cloud account for the first time, click the **Connect** in the **TradeTek Cloud Setup** dialog. You can disconnect from the cloud account at any time by clicking the **Disconnect** button. An admin can login to multiple cloud accounts and then easily switch between them by logging out, then selecting the appropriate account from the drop-down menu to login to. To allow an external application that has been integrated with TradeTek via the Cloud API to connect, click the **Cloud API** button to generate an App Key. The **Cloud API** checkbox must also be checked in the **Preference** dialog to turn Cloud API on. For more information, from the **Developer** tab click the **Cloud API** button then click the **Cloud API Help** button. The **Delete Cloud** button will delete your entire cloud account. To create a backup of your entire cloud account on your local computer, click the **Backup Cloud** button. A **Scheduled Backup** dialog will appear allowing you to set parameters for scheduled backups and choose the folder location on your local computer where the backup files will be stored. You can restore your cloud account from a previous backup by clicking the **Restore Cloud** button. When a user sends data to the cloud, a temporary lock is set before the updated process and is cleared when completed to ensure data integrity. In the event of a hardware failure, internet outage or software issue during the upload process, that lock may remain set. To clear the lock and regain control of TradeTek Cloud, click the **Clear Lock** button. It's important to ensure that no users are attempting to upload data to the cloud during the override process, as this could result in data loss. Although TradeTek maintains backups of all cloud accounts, you can create a fast backup of your entire cloud account to the server at any time by clicking the **Hot Backup** button. The label at the bottom of the setup dialog shows the number of jobs, users and items per job allowed with your current cloud subscription account. If you have upgraded your cloud subscription, click the **Refresh Limits** button to see the upgraded limits. The **Cloud Setup** dialog contains the following tabs:

- **Users**: Add, edit or delete users in the cloud account. To add a new user, click the **Add** button. Enter the username and a password for their login credentials. Choose the authentication type from the drop-down menu. To authenticate by computer which does not require a password to be entered, from the **File** menu click **Preference** then click on the **User Name** in blue. The authentication code will be displayed and saved to the clipboard. Navigate back to the cloud setup dialog and paste the authentication code in for **Computer 1**. The same process can be repeated to authenticate a second computer for the user. Adjust the **Default Job Permissions** as needed for the user then click **OK** to add the new user. To edit an existing user. Click on the username to select it and then click the Edit or Delete button. To alphabetize the user list, click the Alphabetize button.
- **Preferences**: Preference bundles can be created and access granted to the appropriate users. Click the Add button to create a new preference bundle entry. Name the preference bundle and assign the appropriate users. Once a new preferences bundle entry has been created, items can be added to the bundle from the cloud portal dialog (see **Cloud Portal** section below).
- **Settings**: Enter the company contact information that can be displayed on invoices and budgets. If you would like to use email sending features within TradeTek, enter the email server information. In order to link a gmail or yahoo account to TradeTek, start by defining an App Specific password within your Gmail or Yahoo account. That is the password that must be used in the Email Server setup process, NOT the password used to log into your Gmail or Yahoo account. Optionally add a company logo image to be displayed on invoices and budgets. Set a default selection for the assigned user and other users that will automatically get assigned to all new items. To save the settings to the cloud, click the **Upload** button at the bottom right of the dialog.
- **Jobs**: To add a new job entry, click the **Add** button then name the job, assign the job to the primary user and then select additional users who will have access to the job in the **Permissions** area. Assign the job

to a group from the Group drop-down menu at the bottom of the dialog and then click **OK** to add the new job entry. New job groups can be added by clicking the **Groups** button at the bottom of the setup dialog. Once a job entry is made, that job can be uploaded or downloaded from the cloud via the portal dialog (see **Cloud Portal** section below). To move a single job and all associated files from Active to Archive, click on the appropriate job file to select it then click the **To Archive** button. To move multiple jobs and all associated files from Active to Archive, click the **Archive Batch** button. To move a job and all associated files from Archive back to Active, click the **From Archive** button, click on the appropriate job to select it then click the **Extract** button.

- **Lists**: To add a new list entry, click the **Add** button then name the list, assign the list to the primary user and then select additional users who will have access to the list in the **Users** area. To create a new list in the cloud from scratch, click the **Data** button, set the column and row count, add the column names and then click the **OK** button to add the empty list. To access a list to add or modify data, click on the list name to select it then click the **Data** button. To create a cloud list by uploading a CSV file, click the **Upload** button, navigate to and select the appropriate CSV file. To download a list from the cloud to a CSV file, click the **Download** button. Once lists are created in the cloud, they can be connected to the local computer by creating a new external list, set the **TradeTek Cloud** radio button then click the **Select** button to choose the appropriate list to connect to.
- **Budgets**: To add a new budget entry, select the job that the budget is associated with from the **Job** drop-down menu then click the **Add** button and name the budget, assign the list to the primary user and then select additional users who will have access to the budget in the **Users** area. To edit a budgets name or user information, click on the budget to select it, then click the **Edit** button. To delete a budget, click on the budget to select it, then click the **Delete** button. To add or edit line items in a budget, click on the budget name to select it, then click the **Data** button. Click into the appropriate cell to make changes to the data within that cell. To add a new row to the budget, click the **Add Row** button. To recalculate the budget once new numerical data has been entered, click the **Calculate** button. To export the budget to a report file, click the **Report** button then set the parameters in the presented dialog. To build a new budget by importing mapped columns of data from a report, click the **Build** button. To export selected columns from the budget to a CSV file, click the **Custom CSV** button. Prior to using the **Build** or **Custom CSV** buttons, you must set up column mapping from the **Cloud Setup** dialog. To set up column mapping from the **Cloud Setup** dialog, click the **Setup** button. Choose how many custom leading and trailing columns that you would like to add to the budget then click the **Column Map** button. From the **Budget Column Map** dialog, you can map columns of data into the budget from a report by selecting the appropriate report column number under **Report Import Column**. You can also map columns of data from the budget to the **Custom CSV Export** file by selecting the appropriate budget column number under **Custom CSV Export Column**.
- **Invoices**: To add a new invoice entry, select the job that the invoice is associated with from the **Job** drop-down menu then click the **Add** button and name the invoice, assign the list to the primary user and then select additional users who will have access to the invoice in the **Users** area. To edit an invoice's name or user information, click on the invoice to select it, then click the **Edit** button. To delete an invoice, click on the invoice to select it, then click the **Delete** button. To add or edit line items in an invoice, click on the invoice name to select it, then click the **Data** button. Click into the appropriate cell to make changes to the data within that cell. To add a new row to the invoice, click the **Add Row** button. To recalculate the invoice once new numerical data has been entered, click the **Calculate** button. To export the invoice to a report file, click the **Report** button then set the parameters in the presented dialog. To build a new invoice by importing mapped columns of data from a report, click the **Build** button. To export selected columns from the invoice to a CSV file, click the **Custom CSV** button. Prior to using the **Build** or **Custom CSV** buttons, you must set up column mapping from the **Cloud Setup**

dialog. To set up column mapping from the **Cloud Setup** dialog, click the **Setup** button. Choose how many custom leading and trailing columns that you would like to add to the invoice then click the **Column Map** button. From the **Invoice Column Map** dialog, you can map columns of data into the invoice from a report by selecting the appropriate report column number under **Report Import Column**. You can also map columns of data from the budget to the **Custom CSV Export** file by selecting the appropriate budget column number under **Custom CSV Export Column**.

- **Contacts**: The **Contacts** tab is a place where company contacts can be stored in the cloud for all users to access. Groups can be created to store contacts in. To create a contract group, click the **Groups** button, click into the first available cell and type the new group name. To create a new contact, click the **Add** button, fill in the appropriate contact information, assign the primary and other users and select the appropriate group for the contact to be placed in from the **Group** drop-down menu. To clone a contact, click the **Clone** button and then update the first and last name so that those values are unique then make any other appropriate changes and click the **OK** button to add the new contact. To edit an existing contact, click on the contact to select it then click the **Edit** button. To delete an existing contact, click on the contact to select it, then click the **Delete** button. Contacts can also be used to optionally be displayed on invoices.
- **Messages**: From the **Messages** tab, the admin can post messages that are visible to all users who have been designated from the **Cloud Portal** dialog. To add a new message, click the **Add** button then type the desired message, then click the OK button to add the new message. To edit an existing message, click on the message to select it, then click the **Edit** button. To delete an existing message, click on the message to select it, then click the **Delete** button.
- **Logs**: From the Logs tab, the admin can view a list of all cloud user activities. Each log entry includes the date that the action was taken, the username and a description of the action. The previous 10,000 logs are retained in the **Logs** tab.

Cloud Portal: To access the **TradeTek Cloud Portal** dialog, click the **Cloud** button at the top of the application window to the right of the main tabs. The cloud portal dialog is where all standard users (other than the admin) will access the cloud. The portal dialog allows users (based on their permissions set by the admin) to create, download and upload preference bundles, create and manage job files, manage database lists, manage budgets, manage invoices, manage company contacts, post and view messages and manage job specific and other general files. The **Cloud Portal** dialog contains the following tabs:

- **Messages**: View, add, edit or delete messages.
- **Preferences**: Create a new preference bundle by clicking the **Custom** button. Upload or download preference bundles to and from the cloud by clicking the **To Cloud** and **From Cloud** buttons.
- **Jobs**: Cloud jobs are stored in groups which are created by the admin. Prior to performing any cloud job related tasks, be sure to select the appropriate job group from the **Group** drop-down menu. To add a new job entry to the cloud from a locally created job click the **Add** button, select the appropriate job name from the list and click **OK** to create the new cloud entry. To edit an existing cloud job, click on the job name to select it then click the **Edit** button. To create a new local job from a cloud entry job name, click on the appropriate job name to select it then click the **New Job** button. To delete the selected job, click the **Delete** button. To upload the entire job file of the selected job from the local computer to the cloud for the first time, click the **Upload** button. To download the entire job file of the selected job from the cloud to the local computer for the first time, click the **Download** button. To reserve a cloud job that you are currently working on so that other users cannot access it, click the **Reserve** button. To release a selected cloud job that is currently reserved, click the Release button. To sync job data from a local job to the cloud (that has previously been uploaded) click the job name to select it then click the **To**

Cloud button. To sync job data from the cloud to a local job (that has previously been downloaded) click the job name to select it then click the **From Cloud** button.

- **Lists**: To upload a list to the cloud via CSV file, click the **Upload** button. To download a list from the cloud to the local computer, click the **Download** button. To edit a cloud list, click on the list to select it, then click the **Data** button. List groups can be set up and used to toggle between location-based sets of lists. From the **TradeTek Cloud Setup** dialog, click the **Groups** button. Click the **Add** button to add a new location group. Once a group is added, click on the group name to select it then click the **Add Map** button. Enter the virtual list name that will be connected to the external list created in the **List** tab, then select the actual location-based list to be mapped to it. A list map must be set up for each of the main lists in the group. The virtual list names MUST be the same in each added list group. Once all list groups are set up, create each new external list in the **List** tab that will be connected to each group virtual list. Click the **Add List** button, set the **External** radio button, set the **TradeTek Cloud** radio button, click the **List Name** button then select the virtual list to connect the new external list to. Once all of the lists are created and connected in the **List** tab, to toggle the lists between groups click the **Select Group** button located in the **Update** button group in the **List** tab.
- **Contacts**: Select the appropriate contact group from the group drop-down menu to display the contacts within that group. To edit a contact, click on it to select it then click the **Edit** button. To delete a contact, click the **Delete** button. To view a contact, click the **View** button.
- **Budgets**: To upload a budget from the local computer to the cloud, click the **Upload** button. To download a budget from the cloud to the local computer, click the **Download** button. To add or edit line items in a budget, click on the budget name to select it, then click the **Data** button. Click into the appropriate cell to make changes to the data within that cell. To add a new row to the budget, click the **Add Row** button. To recalculate the budget once new numerical data has been entered, click the **Calculate** button. To export the budget to a report file, click the **Report** button then set the parameters in the presented dialog. To build a new budget by importing mapped columns of data from a report, click the **Build** button. To export selected columns from the budget to a CSV file, click the **Custom CSV** button. Prior to using the **Build** or **Custom CSV** buttons, the admin must set up column mapping from the **Cloud Setup** dialog. To edit the notes field of a budget in the **Cloud Portal** dialog, click the **Notes** button. To delete the selected budget, click the **Delete** button. To email a budget directly from TradeTek, click the **Send** button. The admin must set up the email account information from the **Settings** tab in the **Cloud Setup** dialog to be able to use the **Send** button.
- **Invoices**: To upload an invoice from the local computer to the cloud, click the **Upload** button. To download an invoice from the cloud to the local computer, click the **Download** button. To add or edit line items in an invoice, click on the invoice name to select it, then click the **Data** button. Click into the appropriate cell to make changes to the data within that cell. To add a new row to the invoice, click the **Add Row** button. To recalculate the invoice once new numerical data has been entered, click the **Calculate** button. To export the invoice to a report file, click the **Report** button then set the parameters in the presented dialog. To build a new invoice by importing mapped columns of data from a report, click the **Build** button. To export selected columns from the invoice to a CSV file, click the **Custom CSV** button. Prior to using the **Build** or **Custom CSV** buttons, the admin must set up column mapping from the **Cloud Setup** dialog. To edit the notes field of an invoice in the **Cloud Portal** dialog, click the **Notes** button. To delete the selected invoice, click the **Delete** button. To email an invoice directly from TradeTek, click the **Send** button. The admin must set up the email account information from the **Settings** tab in the **Cloud Setup** dialog to be able to use the **Send** button.
- **General**: This tab is an area to store general files that are not associated with a specific job.
- **PDF's, JPG's, CSV's, Excel**: These tabs are used to store each file type that is associated with a specific job. Use the Job drop-down menu to view the files associated with the selected job.

- **Files**: This tab is used to store any other file type that is associated with a specific job. Use the Job drop-down menu to view the files associated with the selected job.

TradeTek Shared

Shared License Management:

Follow this process to set up TradeTek Shared license on the Main and Second computer:

1. Purchase TradeTek Shared and receive TradeTek Shared Serial Number by email.
2. Launch TradeTek previously installed on Main computer.
3. Click **TradeTek Shared** button in the Preferences dialog and enter TradeTek Shared Serial Number.
4. Set **Shared License** checkbox to generate private Cloud space and then click **Done**.
5. Download and install TradeTek Shared on Second computer.
6. Launch and activate using TradeTek Shared Serial Number on Second computer

Move TradeTek Shared License to New Second Computer:

The user installs the TradeTek Shared License on their Laptop or Home computer and activates it with the Shared Serial Number. The user can Release/Restore the Shared License from the Second computer if they buy a new machine.

Plugins are not part of the Shared License experience. Plugins contain executables, may depend on other applications or services on the computer, are relatively large and may use developer specific licensing features outside of the scope of TradeTek. If desired, a Plugin could be installed and licensed independently on the Second computer.

The process of installing, activating, managing or building Bundles is always done on the Main computer.

Move TradeTek Shared License to New Main Computer:

Normally when a TradeTek Shared license is removed from the Main computer, the cloud account and all preference and job data in the cloud is cleared. This process details how to decommission an old Main computer and retain the TradeTek Shared data in the cloud when moving TradeTek to a new Main computer.

1. Make sure the new Main computer is NOT connected to any TradeTek Shared account.
2. Make sure the old Main computer and Second computer is NOT running TradeTek.
3. Start TradeTek on the new Main computer and present the **Preferences** dialog.
4. Click the **TradeTek Shared** button and enter the TradeTek Shared Serial Number.
5. Click the **Shared License** checkbox, then click **OK** to close the TradeTek Shared Setup dialog.
6. Open the **TradeTek Shared Setup** dialog again from the new Main computer and all jobs should now be visible.

Switching between Main and Second Computer:

By design, the Main and Second computer should never run TradeTek at the same time. After the initial setup, preferences should be the same on Main and Second computer. The TradeTek **Shared Setup** dialog is only available from the Main computer and is generally not used again for daily operations.

For daily use, the **Shared** button on the **Home** panel presents the TradeTek **Shared Portal** dialog. Jobs are stored in Local storage on the main and second computer. A job is initially created on one computer, uploaded to the cloud and then downloaded to the other computer. Thereafter the fast **To Cloud** and **From Cloud** buttons are used in the TradeTek **Shared Portal** dialog.

When completing work on a computer, if you plan to use the preferences and jobs on the other computer, remember to sync the preferences and jobs to the cloud with the **To Cloud** buttons. From the other computer, use the **From Cloud** buttons to update the Preferences and Jobs before doing additional work.

If TradeTek is running on the Main computer, TradeTek cannot be opened on the Second computer. If TradeTek is running on the Second computer, TradeTek should generally not be used on the Main computer. As a failsafe, TradeTek allows the user to optionally run TradeTek on the Main computer even if it detects that it was left running on the Second computer, but the user gives up the ability to save any unsaved changes from the Second computer.

Shared Setup: To access the **TradeTek Shared Setup** dialog, click **File** at the top left, click **Preference** then click the **TradeTek Shared** button. To delete your shared account and all associated cloud data, click the **Delete Account** button at the top right corner of the dialog.

In the **Preferences** tab, click the **Backup** button to upload a backup of your entire preference file from the local computer to the cloud. Once a backup has been completed, click the **Restore** button to restore the preferences on the local computer from the cloud backup.

The **Jobs** tab is where shared jobs are managed. To upload a job from the local computer to the cloud, click the **Upload** button then select the appropriate job file. To download a job file from the cloud to the local computer, click on the job name to select it, then click the **Download** button. To delete a cloud job, click on the job name to select it, then click the **Delete** button. To sync changes from a cloud job to the job on the local computer, click the **From Cloud** button. To sync changes from a job on the local computer to the cloud, click the **To Cloud** button.

Shared Portal: To access the TradeTek Shared Portal dialog, click the Shared button to the right of the main tabs across the top. To sync preferences from the cloud to the local computer, click the From Cloud button. To sync preferences from the local computer to the cloud, click the To Cloud button. To sync job data from the cloud to the local computer, click the From Cloud button and select the appropriate cloud job file. Once the appropriate job is opened in TradeTek, to sync job data from the local computer to the cloud, click the To Cloud button.

AI Assistant

To launch AI Assistant, click the AI button located to the right of the main tabs at the top of the application window. Set the appropriate radio button at the left side of the dialog for the knowledge source that you wish to ask a question about. Once the appropriate knowledge source radio button has been selected, type your question into the **Question** input then click the **Ask AI** button at the top right corner of the dialog. The answer will be returned from the AI engine and will be displayed in the Answer area. To clear the **Answer** area, click the **Clear Conversation** button. To save the conversation by exporting a text file to your desktop, click the **Save Conversation** button.

Advanced: Set the **Advanced** checkbox to enable the advanced features in the **AI Assistant** dialog. When activated, the additional knowledgebases that are available in the Enhanced account become visible to select from when asking a question. You can also select a **Question Prefix** to be automatically included in front of your question. See additional information below related to question prefixes. In the **Response Related to Job Pages** area, when a question is asked about multiple pages, set the appropriate radio button to choose to have a separate response for each page or a consolidated response.

Settings: Click the **Settings** button to launch the **AI Settings** dialog. Set the appropriate radio button at the top left corner to toggle between AI engines. All TradeTek with Cloud accounts come with Basic level AI service, which allows you to use all available AI engines and ask a throttled number of questions per day. With the Basic service you can ask general chat questions, questions about pages in the currently opened job or images in the clipboard or on disk and questions about TradeTek (the TradeTek knowledge base comes pre-loaded). Enhanced AI service significantly increases the number of allowed questions per user per day, as well as allowing the user to upload their own job specific knowledge base via pdf file(s) and any other general knowledge base pdf file(s). Contact your Sales Representative to upgrade your AI account from Basic to Enhanced. To use AI to power Auto Page Name instead of the default OCR technology, set the **Use for Auto Page** Name checkbox. Switch between available AI Engine models by selecting from the **Model** drop-down menu. In the **Questions** tab, recently asked questions are listed below **Recent Questions**. Click the **Add to Favorites** button to add a question from **Recent Questions** to the **Favorite Questions** area. To manually add a question to the **Favorite Questions** area, click the **Add** button. Questions in the **Favorite Questions** area are available in the **Question** drop-down menu in the **AI Assistant dialog**. When the **Preload Images for AI Assistant** checkbox is checked, all the pages in the currently opened job will be uploaded to the server as soon as the AI Assistant dialog is launched. When questions are asked related to pages, this will make the response time a little faster.

When AI settings have been customized by the user, click the **Export** button at the bottom left corner of the **AI Settings** dialog to export an AI settings file that can be imported by other computers.

Knowledgebases: The **Knowledge** tab is only accessible from an **Enhanced** AI account. When the **TradeTek** radio button is selected, the preloaded knowledgebase file names are displayed. To upload a job specific pdf knowledgebase file, select the **Job** radio button, add an optional name for the file then click the **Add** button. Use the additional **Custom** radio buttons to add supplemental knowledgebase pdf files. Click the **Clear All Knowledge Files** button to delete all currently listed files.

Question Prefixes: Question prefixes can help determine the way that AI answers your questions. Sometimes it’s helpful to include a prefix in front of your question to help get the type of results that you want. The prefixes listed in the Question Prefix tab are selectable in the AI Assistant dialog when the Advanced checkbox is checked. Some common prefixes are preloaded with additional space for a user added prefix. All prefixes can be modified by the user here.